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HAWAII

ECONOMIC RESEARCH REPORTS

RESEARCH AND ECONOMIC ANALYSIS DIVISION

DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

Fourth Quarter 1983

QUARTERLY STATISTICAL AND ECONOMIC REPORT - STATE OF HAWAII

Fourth Quarter 1983

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore, Sharon Nishi, Karen Yamashita and Tu Duc Pham.

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1. The Economy - Recent Trends

Indicators of economic activity in the State continued to show improvements in some areas of the economy through the third quarter of 1983. However, overall, Hawaii's economy showed only modest forward progress.

The Hawaii Economy

The primary constraint on growth in Hawaii's economy during the last half of 1983 was the absence of strength in the State's visitor and construction industries.

The visitor industry registered an overall 2.6 percent increase in visitor arrivals during the first nine months of 1983 compared with the same 1982 period. However, there were indications that the average length of stay may have declined. It is doubtful, therefore, that any real gain in visitor spending has occurred this past year.

The major source of weakness in the visitor industry can be traced to the foreign visitor segment of the market. The number of eastbound visitors from the Orient and Pacific declined an overall 1.8 percent for the first nine months of 1983 and visitors from Canada declined 20.1 percent in number for the same period. The decline in visitors from Canada reduced the overall gain in westbound visitors (coming from the U.S. Mainland and Canada) to 3.9 percent for the first nine months of the year. The number of westbound visitors from the U.S. Mainland only increased 6.1 percent during the first nine months. The growth in visitors from the Mainland was actually quite satisfactory considering how little time has elapsed since the recession bottomed out in the last quarter of 1982.

In construction, some improvement was evident in second and third quarter data for taxable receipts in the industry (figure 7-1). However, the real gain is small when inflation is taken into account. In the meantime, the long decline in construction employment appeared to be leveling off in the second and third quarters of 1983.

Overall, Hawaii's economy during the first nine months of 1983 appeared to maintain about the same pace of business activity as in 1982, but with fewer jobs. The total value of taxable transactions in the State increased 2.8 percent in the first nine months of the year compared with the same 1982 period. This is not much better than the 2.4 percent increase in Honolulu consumer prices, indicating little overall real progress in the economy for the first nine months. The total job count was down 0.6 percent for the first nine months.

There is, however, encouragement in the progress evident in several specific areas of the economy in the second and third quarters of the year. Retailing and service industry activity has been brisk since the second quarter with receipts for July and August increasing 8.8 percent

for retailing and 12.6 percent for services (not counting hotels). Diversified agricultural receipts have shown considerable strength in 1983 increasing 25.0 percent for the first nine months and over 40 percent since the beginning of the second quarter.

Still, before any significant improvement in Hawaii's economy will be seen, the State's visitor industry and, to an extent, the construction industry will have to experience improved growth.

The U.S. Economy

The recovery of the national economy continued into the fourth quarcer of 1983 as inflation remained low and interest rates appeared to be stabilizing, if not easing somewhat, after increasing in the second and third quarters. Gross national product grew at an annual rate of 9.7 percent in the second quarter and slowed only slightly to a 7.9 percent rate in the third quarter.

2. Economic Outlook for Hawaii and the Nation

The recovery of the U.S. economy is expected to continue through 1984. The large Federal budget deficits projected over the next several years have raised fears of a credit squeeze as early as 1984 as economic activity and private sector borrowing grow. However, the current level of real interest rates (the current market interest rate minus the inflation rate) is quite high by historical standards. This tends to encourage both savings and internal financing. Most national forecasters are anticipating little change in interest rates through 1984. Those that do see changes in interest rates predict slight declines.

Real GNP is expected to grow in excess of 5 percent in 1984 with inflation edging up to the 5 percent per year level.

For Hawaii, further gradual improvement in overall economic conditions is anticipated for the balance of 1983 and 1984. The decline in foreign tourism to Hawaii in 1983 will result in an increase of 2 to 3 percent in the total number of visitors to the State for 1983. Most other sectors of the economy will show gains in business activity during the fourth quarter of the year except for manufacturing which continues to reflect the decline in pineapple processing caused by the closure of Del Monte's canning operations.

The total jobcount will probably continue to lag behind the recovery in business activity with only slight growth until well into 1984.

3. Income and Prices

Total personal income in Hawaii during the second quarter of 1983 was 6.4 percent greater than in the same quarter the year before. The increase in personal income for the first six months of the year was also 6.4 percent.

Consumer prices in Honolulu slowed to a 2.3 percent increase in the first eight months of 1983 over the same 1982 period.

The sharp decline in the inflation rate has resulted in a real gain in personal income of about 4 percent through the first half of 1983.

Figure 3-1

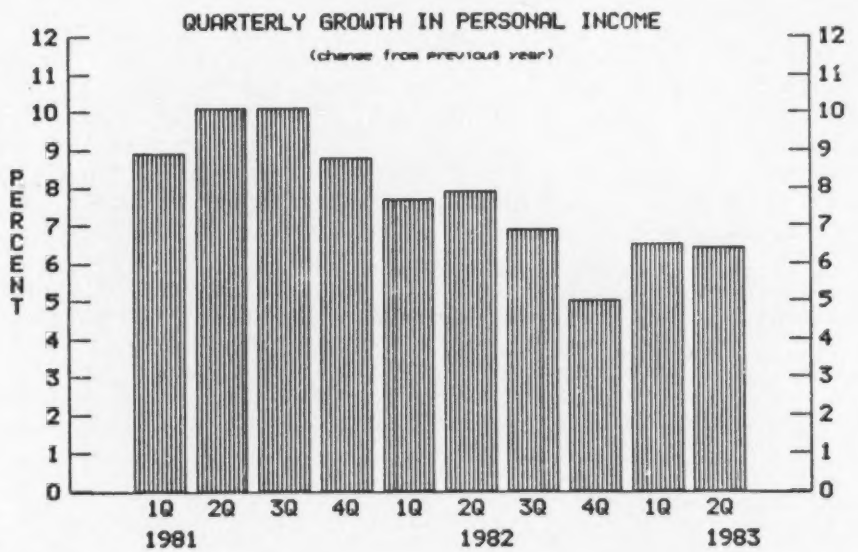


Figure 3-2

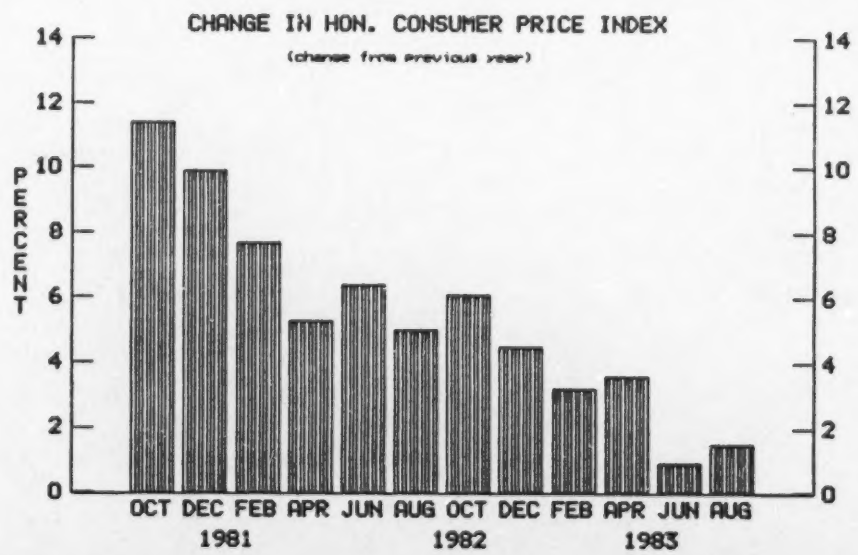


Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII (QUARTERLY DATA SERIES): 1980 TO 1983

[In millions of dollars.]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980 1st Q ..	2,085,730	9,631	11.8	15.3
2nd Q ..	2,112,018	9,692	10.6	13.1
3rd Q ..	2,179,468	9,977	10.4	12.6
4th Q ..	2,257,524	10,301	11.4	13.2
1981 1st Q ..	2,330,571	10,485	11.7	8.9
2nd Q ..	2,385,204	10,670	12.9	10.1
3rd Q ..	2,482,747	10,981	13.9	10.1
4th Q ..	2,508,081	11,210	11.1	8.8
1982 1st Q ..	2,520,221	11,297	8.1	7.7
2nd Q ..	2,556,141	11,515	7.2	7.9
3rd Q ..	2,584,721	11,738	4.1	6.9
4th Q ..	2,625,286	11,765	4.7	5.0
1983 1st Q ..	2,650,509	12,028	5.2	6.5
2nd Q ..	2,709,137	12,250	6.0	6.4

1/ Seasonally adjusted, annual rates.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, October 1983.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE UNITED STATES AND HAWAII (ANNUAL DATA SERIES): 1970 TO 1982

[In millions of dollars.]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970 ..	803,922	3,566	689,190	2,974
1975 ..	1,258,643	5,785	1,090,778	5,000
1980 ..	2,165,315	9,900	1,822,850	8,404
1981 ..	2,434,988	10,836	2,040,564	9,184
1982 ..	2,578,622	11,579	2,170,556	9,936
	Percent change from previous year			
1980 ..	11.0	13.5	10.9	13.5
1981 ..	12.5	9.3	11.9	9.3
1982 ..	5.9	6.6	6.4	8.2

1/ These represent the latest official annual data. More recently published quarterly data may not be consistent with these annual figures.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, August 1983.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS FOR HONOLULU: 1980 TO 1983

[1967=100]

Month and year	All items	Food	Housing	Apparel and upkeep	Trans-portation	Medical care
1980	228.5	259.9	216.6	183.9	223.6	258.6
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1981						
February	243.3	280.3	229.8	190.8	239.9	272.0
April	250.0	284.8	238.9	190.5	244.7	280.6
June	252.8	286.2	242.0	190.2	247.7	286.9
August	256.6	288.4	245.6	193.7	250.9	297.6
October	259.3	290.6	246.7	199.7	252.1	303.7
December	258.3	289.4	244.1	198.2	253.9	305.8
1982						
February	262.0	296.7	248.0	199.4	253.2	307.0
April	263.3	296.5	249.1	201.0	252.0	320.7
June	269.0	298.9	258.3	202.7	254.7	323.3
August	269.4	299.7	256.8	200.8	258.9	327.7
October	275.2	301.2	265.9	202.9	258.9	336.1
December	269.9	303.0	254.6	203.4	256.3	339.5
1983 1/						
February	270.4	304.8	255.0	205.5	251.0	349.0
April	272.8	307.1	257.8	208.7	249.4	355.4
June	271.4	306.1	254.5	205.5	250.0	355.9
August	273.5	307.7	255.5	209.1	254.3	365.5
Percent increase:						
1980 to 1981 .	10.5	10.0	10.9	5.2	10.5	11.9
1981 to 1982 .	6.0	4.5	6.1	4.2	3.4	12.1
Aug. 1982 to Aug. 1983 ..	1.5	2.7	-0.5	4.1	-1.8	11.5

1/ Change in calculation--housing costs measured in rental equivalence (what owners would have to pay if they rented their homes).

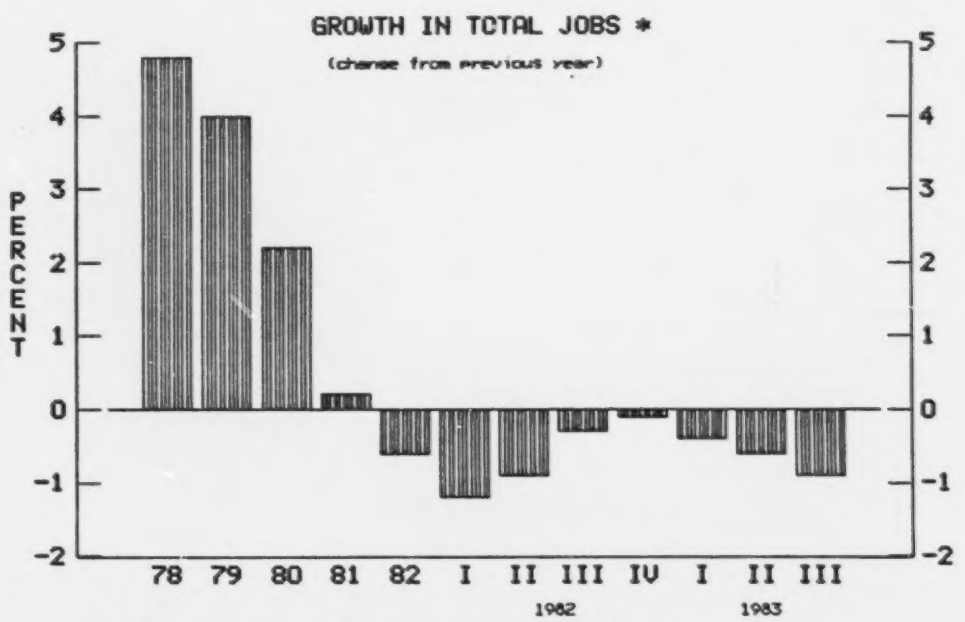
Source: U.S. Department of Labor, Bureau of Labor Statistics.

4. Employment

The total number of jobs in the State for the first nine months of 1983 continued to fall behind the previous year's level. The third quarter decline of 0.9 percent was the largest decline so far this year. Pineapple processing has shown the greatest decline in the latest quarterly data, down 12.1 percent from the third quarter of 1982. Pineapple field jobs were down 12.0 percent. Much of the decline in pineapple operations represents the closure this year of the Del Monte canning plant in Honolulu.

Also showing notable declines in the third quarter from the year before were construction, down 6.7 percent, communications and transportation, both down 5.9 percent, and diversified agriculture, down 3.4 percent.

Figure 4-1



*Total of Non.Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non.Ag. Self Employed Persons and Labor Disputes.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1983

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,200	428,550	404,100	24,450	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	442,350	427,000	401,100	25,900	15,250	11,300	3,950	100
1982								
1st Q ...	439,400	425,500	400,750	24,750	13,900	9,850	4,050	0
2nd Q ...	443,250	428,100	401,950	26,150	15,100	11,400	3,700	50
3rd Q ...	444,100	427,700	400,950	26,750	16,350	12,500	3,850	50
4th Q ...	442,600	426,700	400,750	25,950	15,700	11,350	4,350	200
1983 (p)								
1st Q ...	437,700	424,250	398,450	25,800	13,450	9,850	3,600	0
2nd Q ...	440,800	426,150	399,650	26,500	14,550	11,050	3,500	100
3rd Q ...	440,300	424,300	397,050	27,250	15,650	11,900	3,750	350
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.4	-1.6	-1.8	-1.1	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.5	-3.3	-90.0
1982	-0.6	-0.4	-0.9	6.6	-4.1	-2.2	-9.2	100.0
1982								
1st Q ...	-1.2	-1.1	-1.4	3.3	-5.2	-4.5	-6.9	-100.0
2nd Q ...	-0.9	-0.7	-1.2	7.3	-7.0	-5.6	-10.9	-
3rd Q ...	-0.3	-0.1	-0.6	8.4	-5.7	-3.0	-13.5	-78.0
4th Q ...	-0.1	0.0	-0.5	7.3	-2.9	-1.6	-6.1	117.0
1983 (p)								
1st Q ...	-0.4	-0.3	-0.6	4.2	-3.1	0.0	-10.7	0.0
2nd Q ...	-0.6	-0.5	-0.6	1.3	-3.6	-3.0	-5.4	100.0
3rd Q ...	-0.9	-0.8	-1.0	1.9	-4.3	-4.8	-2.6	600.0

p Preliminary.

NOTE: Data rounded to nearest 50 and detail may not add to totals due to rounding.

1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.

Source: State Department of Labor and Industrial Relations and Department of Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1983

Series	Jan.-Sept. (p)	3rd Qtr. (p)	Percent change from previous year: Jan.-Sept. (p)	Percent change from previous year: 3rd Qtr. (p)
Total jobs 1/	439,600	440,300	-0.6	-0.9
Non-agricultural	398,400	397,050	-.7	-1.0
Construction	16,900	16,600	-7.7	-6.7
Manufacturing	22,000	22,700	-3.3	-5.0
Food processing	11,450	12,300	0.0	-3.1
Transp., commun., utilities ...	30,450	30,250	-3.9	-5.2
Trade	106,250	107,400	0.5	0.8
Wholesale	19,200	19,300	1.9	2.1
Retail	87,050	88,150	0.2	0.7
Finance, insur., & real estate	31,550	31,650	-0.6	-0.2
Services	100,350	99,700	-0.8	-0.9
Hotels	26,050	25,600	-1.7	-2.3
Government	90,850	88,700	1.1	0.1
Federal	32,150	32,100	2.6	1.4
State	45,200	41,100	0.1	-1.7
Local	13,500	15,500	1.5	2.0
Agriculture (wage & salary)	10,950	11,900	-2.7	-4.8
Sugar	4,550	4,750	-3.2	-2.1
Pineapple	2,450	2,950	-7.5	-11.9
Diversified agriculture	3,950	4,200	1.3	-3.4
Non-agricultural self-employed 2/	26,500	27,250	2.3	1.9
Agricultural self-employed 2/ ...	3,600	3,750	-6.5	-2.6
Labor disputes	150	350	200.0	600.0

p Preliminary.

1/ Total of non-agricultural and agricultural wage and salary, self-employed and jobs involved in labor disputes.

2/ Self-employed includes unpaid family workers and domestics.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1983

[Number of jobs.]

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	401,100	327,250	28,700	15,050	30,050
1982					
1st Q	400,750	326,700	29,050	15,250	29,750
2nd Q	401,950	328,300	28,550	15,050	30,100
3rd Q	400,950	326,650	28,750	15,250	30,300
4th Q	400,750	327,400	28,600	14,700	30,100
1983 (p)					
1st Q	398,450	325,150	28,350	14,800	30,150
2nd Q	399,650	326,600	28,250	14,700	30,200
3rd Q	397,050	324,050	28,100	14,850	30,050
	Percent change from same period in previous year				
1980	2.6	2.2	2.9	6.3	4.4
1981	-0.2	-0.2	1.4	0.3	3.5
1982	-0.9	-1.5	-0.5	-1.0	5.6
1982					
1st Q	-1.4	-2.1	1.7	-0.7	4.3
2nd Q	-1.2	-2.0	-0.1	0.2	6.1
3rd Q	-0.6	-1.2	-1.5	-0.7	6.8
4th Q	-0.5	-0.8	-1.6	-3.3	5.5
1983 (p)					
1st Q	-0.6	-0.5	-2.4	-3.0	1.3
2nd Q	-0.6	-0.5	-1.1	-2.3	0.3
3rd Q	-1.0	-0.8	-2.3	-2.6	-0.8

p Preliminary.

NOTE: Data are rounded to nearest 50 and detail may not add to total due to rounding.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1983

[Number of persons.]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	339,550	41,800	20,000	36,650
1981	450,000	345,950	44,300	20,650	39,150
1982	458,000	351,100	44,950	21,000	41,950
1982					
1st Q	455,500	349,500	44,550	21,000	40,500
2nd Q	461,900	354,250	44,750	21,050	41,850
3rd Q	459,950	350,100	45,400	21,300	43,150
4th Q	458,650	350,650	45,150	20,650	42,250
1983					
1st Q	462,750	354,750	44,650	20,900	42,450
2nd Q	464,700	355,600	45,150	20,850	43,100
3rd Q	464,350	354,400	45,250	21,100	43,600
Civilian employment					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	323,950	39,200	19,050	34,750
1981	426,000	328,850	40,850	19,450	36,800
1982	428,000	329,600	40,500	19,300	38,600
1982					
1st Q	425,500	328,250	40,450	19,350	37,500
2nd Q	430,350	332,150	40,000	19,350	38,850
3rd Q	429,000	328,700	40,800	19,650	39,850
4th Q	427,150	329,200	40,800	18,800	38,300
1983					
1st Q	436,550	336,950	40,850	19,400	39,350
2nd Q	434,200	334,950	40,400	19,200	39,700
3rd Q	433,650	333,250	40,850	19,400	40,150

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1983

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons)					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,600	950	1,900
1981	24,000	17,050	3,400	1,200	2,300
1982	31,100	21,500	4,450	1,700	3,300
1982					
1st Q	29,950	21,200	4,100	1,650	3,050
2nd Q	31,550	22,100	4,800	1,750	2,950
3rd Q	30,950	21,400	4,600	1,650	3,300
4th Q	31,500	21,400	4,300	1,850	3,950
1983					
1st Q	26,200	17,800	3,800	1,500	3,100
2nd Q	30,500	20,700	4,750	1,650	3,450
3rd Q	30,700	21,150	4,400	1,700	3,450
Unemployment rate (percent)					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.2	4.6	5.2
1981	5.4	4.9	7.7	5.9	5.9
1982	6.7	6.1	9.9	8.1	7.9
1982					
1st Q	6.6	6.1	9.2	7.9	7.5
2nd Q	6.8	6.2	10.7	8.3	7.0
3rd Q	6.7	6.1	10.1	7.7	7.6
4th Q	6.9	6.1	9.5	9.0	9.3
1983					
1st Q	5.7	5.0	8.5	7.2	7.3
2nd Q	6.7	5.8	10.5	7.9	8.0
3rd Q	6.6	6.0	9.7	8.1	7.9

Source: Hawaii State Department of Labor and Industrial Relations.

5. Business Activity and Tax Revenues

Total taxable transactions in the State through the first eight months increased 2.8 percent over the same 1982 period, just slightly ahead of the rate of increase in Honolulu consumer prices. Second quarter and partial third quarter data for transactions show some improvement over earlier first quarter results, especially in retailing and services.

General fund tax revenues in the first quarter of the State fiscal year (July-September) grew only 3.9 percent from the first quarter of the previous fiscal year. While net corporate income tax receipts were up a sharp 55.3 percent in the first fiscal quarter, general excise tax revenue rose only 0.2 percent and the net collection of individual income taxes actually declined 0.3 percent in the first quarter from the same period in fiscal year 1983.

Figure 5-1

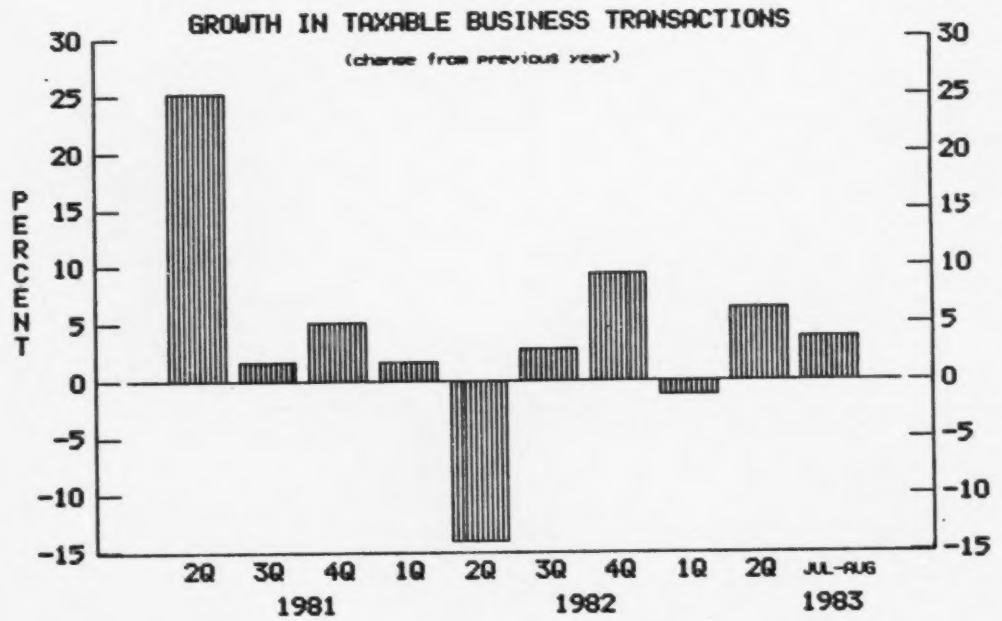


Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1983 1/

[Millions of dollars.]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manu-facturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1981						
1st Q	5,122.0	1,706.3	447.6	200.6	39.8	148.7
2nd Q	6,042.0	1,772.0	501.5	220.6	55.1	191.8
3rd Q	5,053.3	1,674.3	438.7	182.2	39.7	152.7
4th Q	4,689.0	1,538.1	404.2	156.0	38.7	122.6
1982						
1st Q	5,210.7	1,794.9	488.3	244.7	50.2	149.9
2nd Q	5,187.4	1,812.8	511.1	214.4	44.3	149.9
3rd Q	5,194.7	1,729.6	477.0	215.2	40.2	126.8
4th Q	5,129.3	1,706.3	499.7	201.2	42.2	117.6
1983 (Jan-Aug)	14,484.9	5,052.3	1,440.2	587.8	148.4	337.6
1st Q	5,141.5	1,813.8	498.9	224.3	54.3	109.6
2nd Q	5,514.8	1,907.3	566.7	219.2	58.7	125.3
July-Aug ...	3,828.7	1,331.2	374.6	144.3	35.4	102.8
	Percent change from same period in previous year					
1981	10.2	10.1	2.4	5.4	25.0	-0.7
1st Q	8.7	8.7	9.4	-4.9	80.9	-8.6
2nd Q	25.2	15.9	7.3	26.4	29.6	27.9
3rd Q	1.7	10.3	-9.6	-3.7	9.2	-12.2
4th Q	5.1	5.4	4.1	6.7	-4.3	-8.1
1982	-0.9	5.3	10.3	15.3	2.0	-11.6
1st Q	1.7	5.2	9.1	22.0	26.1	0.8
2nd Q	-14.1	2.3	1.9	-2.8	-19.6	-21.9
3rd Q	2.8	3.3	8.7	18.1	1.3	-17.0
4th Q	9.4	10.9	23.6	29.1	9.0	-4.1
1983 (Jan-Aug)	2.8	4.6	8.1	-3.7	25.0	-14.3
1st Q	-1.3	1.1	2.2	-8.3	8.2	-26.9
2nd Q	6.3	5.2	10.9	2.2	39.6	-5.2
July-Aug ...	3.8	8.8	12.6	-4.6	45.9	9.4

NA Not available.
1/ Data lagged one month to account for reporting delay.
Source: Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1970 TO 1983

[Thousands of dollars.]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State general fund 3/
1970	172,289	112,019	13,241	337,216
1975	301,475	178,922	37,310	585,701
1978	392,236	239,587	25,597	749,216
1979	466,535	287,162	37,774	890,434
1980	527,304	335,850	43,913	1,008,750
1981	575,216	349,643	43,595	1,070,895
1982	574,590	296,757	34,785	1,011,465
1982 1st Q	141,147	85,670	10,512	248,406
2nd Q	147,532	12,566	15,604	219,138
3rd Q	151,149	98,191	7,294	284,382
4th Q	134,762	100,330	1,374	259,539
1983 1st Q	155,780	94,313	6,456	267,914
2nd Q	159,436	54,183	9,343	270,680
3rd Q	151,498	97,922	11,330	295,506
	Percent change from corresponding period in previous year			
1978	11.4	12.9	11.2	11.5
1979	18.9	19.9	47.6	18.8
1980	13.0	16.9	16.3	13.3
1981	9.1	4.2	-0.7	6.1
1982	-0.1	-15.1	-20.2	-5.5
1982 1st Q	4.8	2.9	4.7	1.7
2nd Q	-3.1	-84.6	-23.3	-25.6
3rd Q	2.1	5.8	-24.8	5.0
4th Q	-3.9	9.1	-51.7	-0.6
1983 1st Q	10.4	10.1	-38.6	7.9
2nd Q	8.1	331.2	-40.1	23.5
3rd Q	0.2	-0.3	55.3	3.9

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

6. The Visitor Industry

The total number of visitors to Hawaii during the first nine months of the year increased a modest 2.6 percent from the same 1982 period. Westbound visitors from the U.S. Mainland and Canada were up 3.9 percent in number for the first three quarters of the year while eastbound visitors from the Orient and Pacific declined 1.8 percent from the first three quarters of last year.

For the Neighbor Island Counties of Hawaii and Maui, the first nine months of 1983 have seen increased numbers of westbound visitors amounting to 6.6 percent and 6.9 percent respectively. On Kauai the westbound total continued to suffer the after effects of Hurricane Iwa publicity, with visitors down 9.5 percent in number for the first nine months. September visitor data, however, show that Kauai registered its first monthly increase of the year for arrivals.

Figure 6-1

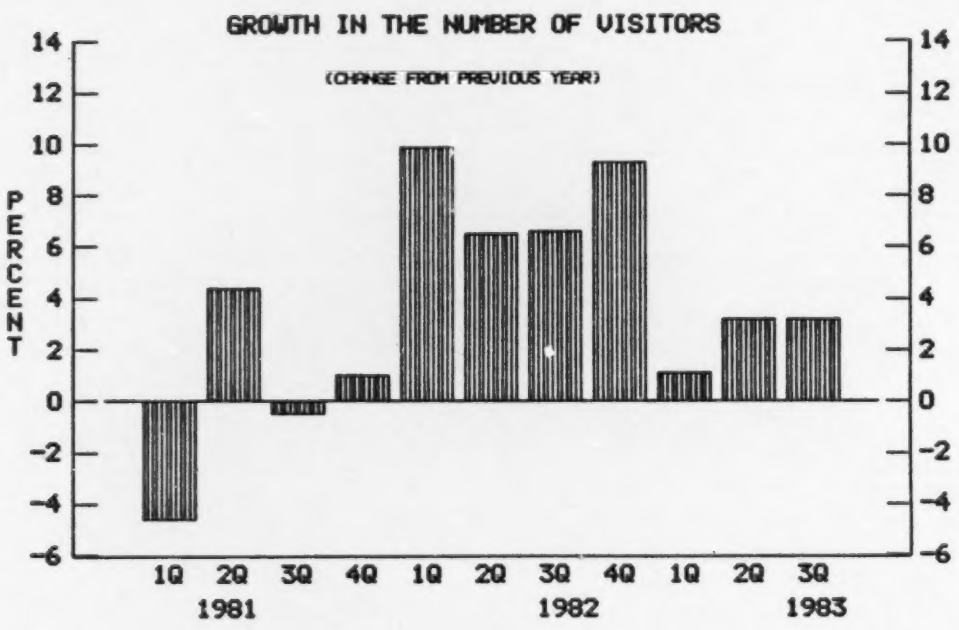


Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1970 TO 1983

Year	Visitors staying Overnight or longer			Average number present	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1970	1,746,970	1,326,135	420,835	32,028	36,943
1975	2,829,105	2,207,417	621,688	59,495	66,308
1978	3,670,309	3,030,999	639,310	85,028	92,034
1979	3,960,531	3,139,455	821,076	89,678	98,676
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,576	96,095
1982	4,242,916	3,278,519	964,397	94,484	106,374
1982 1st Q	1,054,042	827,977	226,065	104,790	116,093
2nd Q	1,048,674	795,858	252,816	86,736	99,376
3rd Q	1,110,729	865,577	245,152	98,547	110,538
4th Q	1,029,471	789,107	240,364	88,004	99,761
1983 Jan-Sept (p) .	3,298,589	2,587,425	711,164	(NA)	(NA)
1st Q	1,069,945	845,441	224,504	(NA)	(NA)
2nd Q (p)	1,082,474	838,537	243,937	(NA)	(NA)
3rd Q (p)	1,146,170	903,447	242,723	(NA)	(NA)
	Percent change from corresponding period in previous year				
1978	6.9	9.7	-4.6	12.3	10.8
1979	7.9	3.6	28.4	5.5	7.2
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.4	10.7
1982 1st Q	9.9	12.9	0.1	15.8	15.5
2nd Q	6.5	7.5	3.5	8.8	9.7
3rd Q	6.6	9.4	-2.8	8.0	8.4
4th Q	9.3	11.1	0.7	11.1	11.7
1983 Jan-Sept (p) .	2.6	3.9	-1.8	-	-
1st Q	1.4	1.9	-0.5	-	-
2nd Q (p)	3.2	5.4	-3.5	-	-
3rd Q (p)	3.2	4.4	-1.0	-	-

p Preliminary.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS TO THE NEIGHBOR ISLANDS: 1970 TO 1983

Year 1/	Westbound visitors to Neighbor Islands		
	Hawaii	Maui	Kauai
1970 (unrevised)	445,401	447,985	410,075
1975 (unrevised)	769,779	931,863	632,821
1978 (unrevised)	908,983	1,403,054	837,712
1979 (unrevised)	860,940	1,419,773	825,366
1980 (unrevised).....	761,103	1,378,189	781,409
1981 (revised)	672,683	1,389,892	757,811
1982 (revised)	703,901	1,608,222	760,549
1982: 1st Q	179,007	416,270	189,608
2nd Q	163,610	384,670	197,938
3rd Q	179,392	407,318	208,740
4th Q	181,892	399,964	164,263
1983: Jan-Sept (p) .	556,537	1,291,551	539,897
1st Q	198,116	426,926	154,800
2nd Q (p)	169,517	411,261	177,914
3rd Q (p)	188,904	453,364	207,183
	Percent change from corresponding period in previous year		
1978	8.3	11.6	13.1
1979	-5.3	1.2	-1.5
1980	-12.0	-3.0	-5.3
1981 1/	(NA)	(NA)	(NA)
1982 1/	4.9	15.6	0.5
1982: 1st Q	4.3	18.6	5.3
2nd Q	1.1	10.9	1.6
3rd Q	2.7	12.7	2.4
4th Q	10.5	20.8	-8.3
1983: Jan-Sept (p) .	6.6	6.9	-9.5
1st Q	10.5	2.4	-18.6
2nd Q (p)	3.6	6.9	-10.1
3rd Q (p)	5.3	11.3	-0.7

p Preliminary.

1/ 1981 and 1982 data have been revised and are not comparable to previous years.

Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1983

[Survey does not include some large hotel chains.]

Date	State	Waikiki	Hawaii	Kauai	Maui
Annual average:					
1970	71.2	74.1	68.3	58.0	66.7
1975	74.1	78.3	59.9	77.2	72.3
1978	79.5	82.1	65.0	83.3	80.4
1979	73.8	77.1	62.0	76.5	73.0
1980	69.3	71.7	52.7	69.0	66.2
1981	68.2	73.9	44.9	62.7	70.3
1982	70.4	77.7	44.0	67.5	73.9
1983 (Jan-Sept)	71.3	78.2	44.8	58.6	76.5
1982					
January	67.7	76.5	36.7	50.4	66.6
February	85.8	94.2	59.8	70.1	89.3
March	83.8	93.6	51.3	68.2	89.2
April	68.2	74.3	42.0	55.9	74.6
May	61.8	66.9	38.9	54.7	64.3
June	67.6	75.4	37.5	61.2	67.5
July	71.2	80.6	46.2	63.5	74.4
August	74.1	80.7	55.8	61.2	74.0
September	67.3	75.9	38.1	56.7	67.5
October	67.3	74.5	44.7	51.9	70.6
November	75.0	74.5	45.2	47.5	75.8
December	64.6	70.0	41.3	43.3	67.9
1983					
January	63.4	70.3	41.8	43.8	65.7
February	80.8	90.3	55.0	63.3	88.7
March	79.9	87.9	49.7	57.6	88.1
April	65.3	71.2	40.8	47.8	72.9
May	63.3	69.6	36.9	55.0	69.8
June	74.6	81.6	43.7	66.1	79.1
July	73.3	81.9	45.1	64.0	73.5
August	75.3	80.2	49.9	66.8	83.1
September	66.1	71.9	40.7	62.5	68.7

Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company from 1981.

Table 6-4.-- EXISTING HOTEL UNITS: 1970 TO 1983

(Number of units.)

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui 1/
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110

1/ Includes Maui, Molokai, and Lanai.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES, BY ISLANDS: 1970 TO 1983

[Dollars.]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	-	-	-	-
1975	29.75	-	-	-	-
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
(Jan-Sept)	52.08	44.73	47.69	76.43	58.36
1983 (Jan-Sept)	54.56	46.73	49.14	81.77	59.10
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983 (Jan-Sept)	4.8	4.5	3.0	7.0	1.3

Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

7. Construction

As figure 7-1 indicates, Hawaii's construction industry has broken seven consecutive quarters of declining dollar receipts in the second quarter of 1983 showing at least current dollar growth.

The value of new private building permits issued in the third quarter of 1983 will probably show a decline from the year before when all the figures are in. The main reason for this percentage decline is the exceptionally high value of permits issued in the second quarter of 1982.

Table 7-7 shows that the sharp increase in single-family home construction in the first half of 1983 has caused a surge in the Honolulu Construction Cost Index for single-family type construction. In September, the index was 9.0 percent higher than in the same month of 1982. By contrast, the high rise construction cost index was just 4.8 percent above the previous year's September level.

Figure 7-1

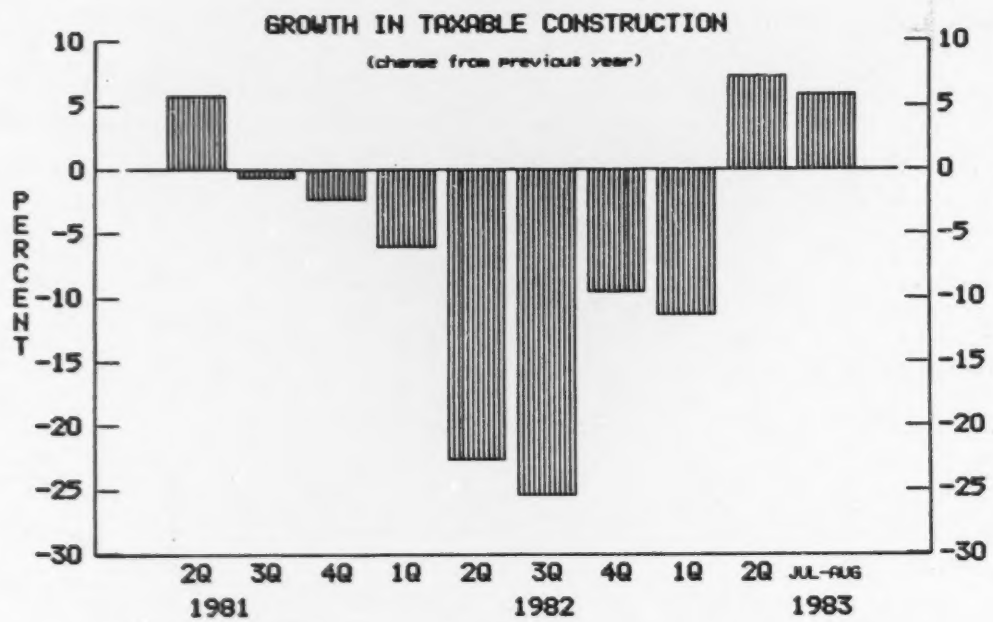


Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1983

[Millions of dollars.]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1980	1,569.7	1,219.2	680.2	331.5	207.5	230.6
1981	1,584.7	802.0	398.3	240.8	162.9	427.5
1982	1,323.9	683.1	299.2	242.9	141.1	392.7
1982 1st Q ...	358.9	93.3	40.0	27.7	25.6	67.3
2nd Q ...	335.0	135.7	52.5	38.4	44.9	128.6
3rd Q ...	310.9	277.4	110.8	131.4	35.2	104.3
4th Q ...	319.1	176.7	95.9	45.4	35.3	92.5
1983 1st Q ...	318.5	117.3	57.4	24.2	41.4	95.4
2nd Q ...	359.4	156.9	66.9	33.8	56.3	23.7
3rd Q ...	240.1 3/	(NA)	(NA)	(NA)	(NA)	71.6
	Percent change from corresponding period in previous year					
1980	16.9	39.3	27.1	53.8	67.2	-40.7
1981	1.0	-34.2	-41.4	-27.4	-21.5	85.4
1982	-16.5	-14.8	-24.9	0.9	-13.4	-8.1
1982 1st Q ...	-6.1	-58.9	-61.1	-65.9	-40.6	-38.5
2nd Q ...	-22.6	-49.0	-71.0	-23.7	29.0	148.7
3rd Q ...	-25.4	63.9	56.3	183.8	-32.4	24.1
4th Q ...	-9.5	26.7	120.0	-27.9	7.3	-49.3
1983 1st Q ...	-11.3	25.7	43.5	-12.6	61.7	41.8
2nd Q ...	7.3	15.6	27.4	-12.0	25.4	-81.6
3rd Q ...	5.9 3/	-	-	-	-	-31.4

NA Not available.

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

3/ July and August only.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1983

[Millions of dollars.]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1982 1st Q ...	93.3	50.3	13.7	14.6	14.7
2nd Q ...	135.7	76.7	35.6	11.1	12.4
3rd Q ...	277.4	201.6	12.4	11.1	52.3
4th Q ...	176.7	144.4	13.4	7.5	11.4
1983 1st Q ...	117.3	65.4	18.8	21.4	11.8
2nd Q ...	156.9	80.4	22.2	37.7	16.5
3rd Q ...	(NA)	139.0	25.0	(NA)	15.3
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1982 1st Q ...	-58.9	-46.0	-74.6	-15.1	-62.8
2nd Q ...	-49.0	-59.7	103.4	-40.3	-68.6
3rd Q ...	63.9	122.6	-73.5	-22.3	198.9
4th Q ...	26.7	80.7	-26.4	-57.6	-42.1
1983 1st Q ...	25.7	30.0	37.2	46.5	-19.7
2nd Q ...	15.6	4.8	-37.6	239.6	34.6
3rd Q ...	-	-31.1	101.6	-	-70.7

NA Not available.
Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED: 1970 TO 1983

[Millions of dollars.]

	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1982				
1st Q	67.3	21.2	27.7	18.3
2nd Q	128.6	78.4	37.1	13.1
3rd Q	104.3	5.9	81.1	17.4
4th Q	92.5	34.1	36.1	22.4
1983				
1st Q	95.4	11.7	53.7	30.1
2nd Q	23.7	5.7	8.4	9.6
3rd Q	71.6	16.9	37.0	17.7
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1982				
1st Q	-38.5	2.7	-62.6	25.9
2nd Q	148.7	353.2	43.2	54.1
3rd Q	24.1	-62.0	134.5	-48.9
4th Q	-49.3	-72.2	-21.4	63.5
1983				
1st Q	41.8	-44.8	93.9	64.4
2nd Q	-81.6	-92.3	-77.4	-26.7
3rd Q	-31.4	186.4	-54.4	1.7

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1983

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1976	3,383	1,384	821	297	881
1977	4,891	2,281	1,074	445	1,091
1978	5,219	2,270	1,382	567	1,000
1979	6,181	3,156	1,445	556	1,024
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1982 1st Q	472	82	197	62	131
2nd Q	536	122	213	63	138
3rd Q	626	217	186	61	162
4th Q	651	304	204	44	99
1983 1st Q	896	471	242	57	126
2nd Q	952	502	212	73	165
3rd Q	(NA)	396	240	(NA)	146
	Percent change from corresponding period in previous year				
1978	6.7	0.5	28.7	27.4	-8.3
1979	18.4	39.0	4.6	-1.9	2.4
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1982 1st Q	-39.1	-65.0	-26.8	-54.7	-3.0
2nd Q	-23.1	-43.8	-23.7	-40.0	43.8
3rd Q	-1.9	23.3	-35.9	-14.1	60.3
4th Q	20.8	201.0	-2.9	-54.2	-25.0
1983 1st Q	89.8	474.4	22.8	-8.1	-8.7
2nd Q	77.6	311.5	-0.5	15.9	19.6
3rd Q	-	82.5	29.0	-	-9.9

NA Not available.
1/ Includes duplexes.
Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1983 1/

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1976	3,751	3,397	129	4	221
1977	3,129	2,389	129	83	528
1978	4,236	1,968	334	610	1,324
1979	6,351	1,804	718	1,125	2,704
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1982 1st Q	313	73	0	118	122
2nd Q	182	6	176	0	0
3rd Q	1,831	1,776	55	0	0
4th Q	2,268	2,254	14	0	0
1983 1st Q	11	0	11	0	0
2nd Q	168	149	0	9	10
3rd Q	(NA)	967	27	(NA)	0
	Percent change from corresponding period in previous year				
1978	39.1	-1.8	158.9	-	150.8
1979	49.9	-8.3	115.0	84.4	104.2
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1982 1st Q	-57.8	-52.9	-100.0	156.5	-76.5
2nd Q	-90.3	-100.0	-	-100.0	-100.0
3rd Q	347.7	3,936.0	-77.9	-100.0	-100.0
4th Q	1,889.5	2,200.0	-	-	-100.0
1983 1st Q	-96.5	-100.0	-	-100.0	100.0
2nd Q	-7.7	2,383.3	-100.0	-	-
3rd Q	-	-45.6	-50.1	-	0

NA Not available.
1/ Three or more units per structure.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1983

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1976	21,400	36.2	19,350	5,650	22.6	8.80
1977	19,750	35.7	17,650	4,150	19.1	9.87
1978	20,650	36.6	18,900	2,500	11.7	10.53
1979	23,400	36.0	21,050	1,700	7.5	11.05
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	22,300	36.1	20,150	3,500	14.8	13.18
1982	18,950	35.2	16,700	4,000	19.3	14.42
1982 1st Q ..	20,350	34.5	17,550	4,750	21.3	13.98
2nd Q ..	19,200	35.6	17,100	4,200	19.7	14.21
3rd Q ..	18,600	37.5	17,500	3,650	17.3	14.26
4th Q ..	17,750	33.1	14,700	3,450	19.0	15.21
1983 1st Q ..	17,200	38.6	16,600	(NA)	(NA)	15.53
2nd Q ..	16,850	37.6	15,850	(NA)	(NA)	15.64
3rd Q ..	16,900	(NA)	(NA)	(NA)	(NA)	(NA)
	Percent change from corresponding period in previous year					
1975	-5.6	0.3	-5.3	66.0	-	8.3
1976	-18.8	-4.5	-22.4	36.1	-	12.7
1977	-7.7	-1.4	-8.8	-26.5	-	12.2
1978	4.6	2.5	7.1	-39.8	-	6.7
1979	13.3	-1.6	11.4	-32.0	-	4.9
1980	2.4	0.6	3.1	55.9	-	7.2
1981	-6.9	-0.3	-7.1	32.1	-	11.2
1982	-15.0	-2.5	-17.1	14.3	-	9.4
1982 1st Q ..	-11.3	-11.3	-21.3	58.3	-	9.4
2nd Q ..	-14.5	2.3	-12.5	21.7	-	9.5
3rd Q ..	-16.8	3.3	-13.8	4.3	-	8.4
4th Q ..	-17.3	-3.5	-20.1	-13.8	-	10.2
1983 1st Q ..	-15.5	11.9	-5.4	-	-	11.1
2nd Q ..	-6.9	5.6	-7.3	-	-	10.1
3rd Q ..	-7.7	-	-	-	-	-

NA Not available.

1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.

2/ Equivalent number of jobs if all workers had worked a 40-hour week.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1983

[1967=100.]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1979	266.2	248.3	288.8	264.3	237.6	287.5
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1982						
March ..	301.2	250.1	365.6	326.5	281.4	365.6
June ...	301.5	249.0	367.6	326.4	279.5	367.0
Sept. ..	310.4	249.1	387.9	339.1	281.3	389.1
Dec. ...	314.2	253.9	390.3	342.6	286.0	391.7
1983						
March ..	324.0	267.7	395.0	348.7	292.4	397.4
June ...	336.6	288.9	396.8	351.5	297.1	398.6
Sept. ..	338.2	282.6	408.4	355.4	296.7	406.3
	Percent change from corresponding period in previous year					
1979	9.4	13.5	5.2	9.5	16.1	5.3
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1982						
March ..	4.4	-1.6	10.1	7.2	3.5	9.9
June ...	5.0	-0.5	10.2	7.1	2.8	10.0
Sept. ..	4.5	-2.2	10.7	7.9	3.0	11.2
Dec. ...	6.0	1.0	10.6	7.5	1.7	11.4
1983						
March ..	7.6	7.0	8.0	6.8	3.9	8.7
June ...	11.6	16.0	7.9	7.7	6.3	8.6
Sept. ..	9.0	13.4	5.3	4.8	5.5	4.4

1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

8. Major Sources of Income

Defense expenditure reports available for 1983 to date indicate about a 10 percent increase in defense spending in the State for the first nine months. Defense expenditures in Hawaii during 1982 rose almost 17 percent from the 1981 level.

The value of processed sugar shipments to the Mainland for the first eight months of the year registered a 43 percent increase over the same 1982 period. Shipments of canned pineapple, however, declined 8.3 percent in the first eight months of 1983.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1982

[Millions of dollars.]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1971	705	708.8	202.9	141.4
1972	840	744.2	184.7	145.4
1973	1,020	840.9	222.2	142.4
1974	1,225	897.9	676.6	127.1
1975	1,360	982.9	366.1	136.7
1976	1,640	1,034.2	257.0	144.5
1977	1,845	1,086.6	226.8	161.6
1978	2,146	1,155.5	285.2	162.9
1979	2,537	1,221.7	345.7	206.4
1980	2,875	1,317.4	594.1	226.5
1981	3,200(p)	1,449.3	327.9	217.6
1982	3,700(p)	1,693.4	351.5	206.0

NA Not available. (p) Preliminary.

1/ Includes value of molasses.

Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaii Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1983 1/

[Millions of dollars.]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1982					
1st Q	402.3	211.0	142.7	41.1	7.4
2nd Q	411.9 2/	208.9	151.1	44.5	7.4
3rd Q	443.4	223.7	168.9	43.3	7.5
4th Q	435.9	234.6	148.8	44.8	7.6
1983					
1st Q	(NA)	230.7	187.3	43.8	(NA)
2nd Q	(NA)	237.7	163.1	45.5	(NA)
3rd Q	(NA)	229.9	178.2	(NA)	(NA)
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1982					
1st Q	18.0	18.8	19.7	7.6	23.3
2nd Q	21.1	15.9	29.4	22.9	10.4
3rd Q	19.4	12.9	33.1	8.7	13.6
4th Q	9.9	9.4	13.7	1.6	2.7
1983					
1st Q	-	7.6	31.3	6.6	-
2nd Q	-	13.8	7.9	2.2	-
3rd Q	-	2.8	5.5	-	-

NA Not available.

1/ Includes all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

2/ Estimated.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- DEFENSE EXPENDITURES BY TYPE: 1975 TO 1982

[In thousands of dollars.]

Year	All categories	Military payroll	Civilian payroll	Supplies, equipment, services
1975	982,779	396,413	281,955	304,411
1976	1,034,226	420,051	301,347	312,828
1977	1,086,561	432,754	325,778	328,029
1978	1,155,517	465,449	354,530	335,538
1979	1,221,784	497,840	372,596	351,348
1980	1,317 402	533,691	418,759	364,952
1981	1,449,328	612,761	450,684	385,883
1982	1,693,410	716,841	508,569	468,000
1981				
1st Q	341,077	140,739	99,430	100,908
2nd Q	339,978	145,968	102,400	91,610
3rd Q	371,505	153,370	118,081	100,054
4th Q	396,768	172,684	130,773	93,311
1982				
1st Q	402,261	171,636	114,745	115,880
2nd Q	411,937	174,203	119,919	117,814
3rd Q	443,359	183,370	131,515	128,474
4th Q	435,854	187,632	142,390	105,832

Source: Quarterly reports from the armed forces.

Table 8-4.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1983 1/

Year	Value of shipments 2/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 3/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1981				
1st Q	124.2	26.8	47.3	-9.3
2nd Q	121.6	50.1	-19.2	-2.2
3rd Q	84.4	64.0	-48.2	-11.1
4th Q	62.4	28.9	-57.8	-24.3
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	93.1	47.4	49.1
1983 (Jan-Aug)	298.4	109.7	43.3	-8.3
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
July-Aug ..	92.6	36.7	43.4	0.4

NA Not available.

1/ These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 25, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

2/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

3/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- CURRENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period 2/	Number	Percent change	
				From preceding period	From same period in previous year
Resident population 3/					
State	Persons	July 1, 1982	994,000	-	1.5
City and County of Honolulu	Persons	July 1, 1982	775,200	-	1.0
Hawaii County	Persons	July 1, 1982	98,000	-	2.3
Kauai County	Persons	July 1, 1982	40,800	-	2.0
Maui County	Persons	July 1, 1982	79,800	-	5.7
Income					
Total personal income 3/	$ Million	2nd Quarter	12,250	1.8	6.4
Consumer price index (Honolulu)					
All items	(1967=100)	August	273.5	0.8 4/	1.5
Food prices	(1967=100)	August	307.7	0.5 4/	2.7
Construction					
Total private permits	$ Million	2nd Quarter	156.9	33.8	15.6
Total residential permits	$ Million	2nd Quarter	66.9	16.6	27.4
New single-family units	Number	2nd Quarter	952	6.2	77.6
New multi-family units	Number	2nd Quarter	168	1,427	-7.7
Government contracts awarded	$ Million	3rd Quarter	71.6	202.1	-31.4
Construction cost indexes (Hon.)					
Single family	(1967=100)	September	338.2	6.5 4/	9.0
High-rise buildings	(1967=100)	September	355.4	1.1 4/	4.8
Employment (p)					
Total civilian labor force	Persons	3rd Quarter	464,350	-0.1	0.1
Civilian employment	Persons	3rd Quarter	433,650	-0.1	1.1
Civilian unemployment	Persons	3rd Quarter	30,700	6.6	-0.8
Unemployment rate	Percent	3rd Quarter	6.6	-	-
Total jobs	Number	3rd Quarter	440,300	-0.1	-0.9
Visitor industry					
Total visitors (p)	Number	Jan.-Sept.	3,298,589	-	2.6
Westbound	Number	Jan.-Sept.	2,587,425	-	3.9
Eastbound	Number	Jan.-Sept.	711,164	-	-1.8
Visitor expenditures (p)	$ Million	1982	3,700	-	15.6
Hotel units	Number	February	58,765	-	1.4
Defense expenditures	$ Million	1982	1,693	-	16.8
Sugar production	$ Million	1982	351.5	-	7.2
Pineapple sales	$ Million	1982	206.0	-	-5.3

p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ 1983 data unless indicated otherwise.
3/ Seasonally adjusted annual rate.
4/ From June.

2/7/64 S2090-2 .4

HAWAII

ECONOMIC RESEARCH REPORTS

RESEARCH AND ECONOMIC ANALYSIS DIVISION

DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

First Quarter 1984

QUARTERLY STATISTICAL AND ECONOMIC REPORT - STATE OF HAWAII

First Quarter 1984

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore, Karen Yamashita and Tu Duc Pham.

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1. The Economy -- Recent Trends

Progress towards economic recovery in Hawaii continued to be evident through the third and into the fourth quarters of 1983. But while business activity in the last half of 1983 definitely accelerated from that experienced earlier in the year, the State's visitor industry continued to show only modest improvement in visitor arrival rates. Also, growth in the number of jobs in Hawaii remained flat throughout the year in spite of the quicker pace of business activity.

Nationally, the economic recovery continued through the end of 1983, but interest rates remained high and unrestrained Federal deficits threatened to generate inflationary pressures in 1984.

In 1984, Hawaii can expect to experience a continuation of the slow recovery begun last year; however, a more robust rate of growth will probably not be experienced until late this year or 1985.

The Hawaii Economy

Despite a disappointingly modest growth for the visitor industry in 1983, the overall pace of business activity in the State picked up in the last half of the year. The total dollar volume of taxable transactions in the third quarter of last year posted an 8.0 percent increase over the same 1982 period (Table 5-1). Diversified agricultural sales continued to experience the sharpest growth with a third quarter increase of 35.3 percent over the previous year's third quarter. Service industry receipts increased 15.6 percent in the third quarter; and for the first quarter in more than a year, diversified manufacturing sales showed an increase from the previous year -- an impressive 12.9 percent for the 1983 third quarter.

The third quarter strength in transactions translated into a surge in excise tax collections, as indicated in Table 5-2, with the October-November total up 14.0 percent. Total revenues distributed to the State general fund jumped 14.9 percent in the 1983 October-November period from the same 1982 months.

Still, the basis for the upsurge in transactions was unclear since the visitor industry actually appeared to be slowing somewhat in the second half of the year (Table 6-1). The number of visitors to Hawaii increased just 3.2 percent in the third quarter of 1983 and only 0.5 percent in October.

The labor market has certainly shown no discernible reaction to the growth in business receipts during the last half of 1983. The October-November 1983 jobs total for the State was actually 0.3 percent below the comparable 1982 total (Table 4-2).

The U.S. Economy

The U.S. Department of Commerce has estimated on a preliminary basis that the gross national product grew at an annual rate of 4.5 percent in the last quarter of 1983. Further, the national civilian unemployment rate dropped to 8.4 percent in November 1983, its lowest point since November 1981. Inflation has held at about the 3 percent level throughout the past 12 months of recovery. In short, the U.S. economy appears to be recovering better than expected and without a resurgence of inflation. The only areas where no significant improvement has been accomplished are those of interest rates and Federal deficits.

2. Economic Outlook for Hawaii and the Nation

Most national economic forecasts predict a continuation of the U.S. recovery through 1984 with interest rates remaining about the same as the level currently being experienced but with some modest increase in inflationary pressures. A few economists, on the other hand, think that the large Federal deficit will put increasing pressure on both interest rates and prices in 1984 to the detriment of the recovery. Thus, while the continuation of the recovery in 1984 is fairly certain, there are clouds on the economic horizon that could threaten continuation of the current economic expansion beyond 1984. Table 2-1 presents the most recent available UCLA business forecast for the nation.

In Hawaii, economic recovery is also expected to continue at a modest pace in 1984. As indicated in Table 2-2, an increase in employment of about 1.8 percent is forecast along with a 7.2 percent increase in current dollar personal income (2.0 percent increase in real income).

In 1985, assuming sustained growth at the national level, Hawaii's economy is expected to show a 2.1 percent increase in the number of total jobs with personal income increasing 7.8 percent from 1984.

This forecast is based on several key assumptions. It assumes that the U.S. economy can sustain the current expansion through 1985 without experiencing an upsurge in either inflation or interest rates. The assumption for consumer prices in Hawaii is an average 5 percent increase through 1985 with interest rates averaging at or slightly below current levels.

The forecast is also based on the assumption of a minimum 3 percent increase in real visitor expenditures in 1984 followed by a 5 percent increase in 1985. The number of visitors to Hawaii is expected to increase between 3 to 5 percent this year with real expenditures slightly lower than the increase in visitor numbers. The lower end of this range has been utilized for forecasting purposes.

The forecast presumes a modest increase in defense expenditures for payroll during 1984 and 1985 but a decline in Federal expenditures for construction in 1985.

Finally, due to their uncertain nature, revenues from sugar and pineapple sales are assumed to show no growth in 1984 and 1985 for forecasting purposes.

Table 2-1.-- UCLA NATIONAL ECONOMIC FORECAST: 1984 AND 1985

Economic variable	1983 (estimates)	Forecast	
		1984	1985
	(Percent change from previous year)		
GNP (constant dollar)	3.1	5.1	4.0
U.S. Consumer Price Index (CPI-U)	3.2	5.1	5.4
U.S. employment	0.3	1.1	3.3
	(Percentage)		
U.S. unemployment rate	9.8	8.4	7.7
Existing home mortgages	13.5	13.3	13.0
Treasury bills (3-months)	8.7	8.2	9.2
	(Millions of housing units)		
U.S. housing starts	1.7	1.8	1.8

Source: UCLA National Business Forecast, UCLA Business Forecasting Project, September 1983.

Table 2-2.-- DPED ECONOMIC FORECASTS FOR HAWAII: 1984 AND 1985

[Calendar years.]

Economic variable	Actual or estimated data 1983	Forecast data 1984	Forecast data 1985	Percent change 83-84	Percent change 84-85
Forecast assumptions 1/					
Population 2/ (thousands)	- 3/	-	-	1.6	1.6
Visitor arrivals (Million)	4.4	4.5	4.9	3.0 2/	5.0
Consumer price index (1967=100)	274.6	288.3	302.7	5.0	5.0
Sugar tax base (Millions of current dollars)	413.3	413.3	413.3	0	0
Pineapple tax base (Millions of current dollars)	170.6	170.6	170.6	0	0
Personal income (Millions of current dollars).....	12,232	13,115	14,135	7.2	7.8
Total jobs (1,000)	439.2	447.1	456.4	1.8	2.1
Construction	16.7	17.5	19.5	4.8	11.4
Manufacturing	22.2	22.5	22.8	1.4	1.3
Agriculture	11.1	10.5	10.6	-5.4	1.0
Government	91.0	91.4	91.8	0.4	0.4
Other salary & wage jobs	298.2	305.2	311.7	2.3	2.1
Self-employed	30.0	30.3	30.7	1.0	1.2
Total construction (Constant 1972 dollars)	531	540	625	1.6	15.8
Residential	164	187	247	14.0	32.2
Commercial/Industrial	134	125	152	-6.7	21.8
Government	200	185	170	-7.5	-8.1
Non-structural	33	43	56	28.8	30.5

1/ Used in forecasting other variables.

2/ 1984 assumption represents the low end of a predicted 3 to 5 percent increase range.

3/ Official 1983 population estimates not yet available.

Source: Department of Planning and Economic Development, February 1983.

3. Income and Prices

Total personal income in Hawaii during the second quarter of 1983 was 6.4 percent greater than in the same quarter the year before. The increase in personal income for the first six months of the year was also 6.4 percent.

Consumer prices in Honolulu slowed to a 1.9 percent increase in the first ten months of 1983 over the same 1982 period. The October 1983 index number increased only 0.4 percent from twelve months earlier.

The sharp decline in the inflation rate resulted in a real gain in personal income of about 4 percent through the first half of 1983.

Figure 3-1

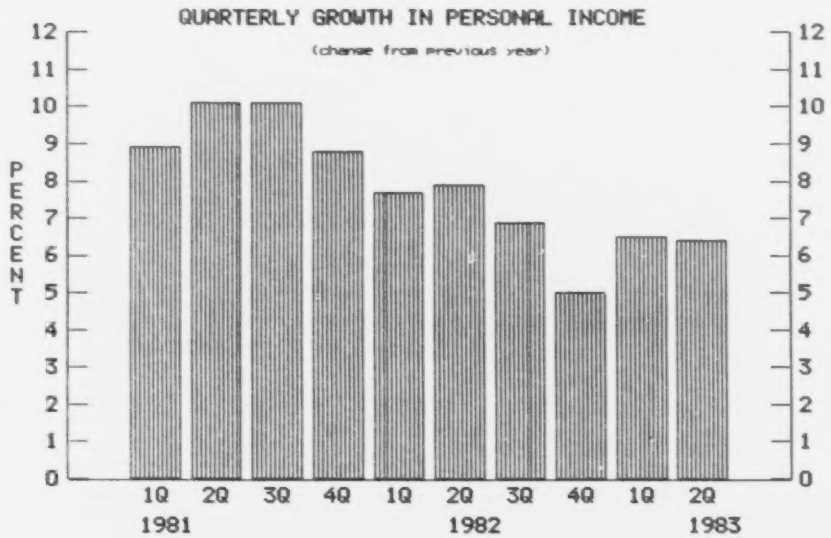


Figure 3-2

Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII (QUARTERLY DATA SERIES): 1980 TO 1983

[In millions of dollars.]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980 1st Q ..	2,085,730	9,631	11.8	15.3
2nd Q ..	2,112,018	9,692	10.6	13.1
3rd Q ..	2,179,468	9,977	10.4	12.6
4th Q ..	2,257,524	10,301	11.4	13.2
1981 1st Q ..	2,330,571	10,485	11.7	8.9
2nd Q ..	2,385,204	10,670	12.9	10.1
3rd Q ..	2,482,747	10,981	13.9	10.1
4th Q ..	2,508,081	11,210	11.1	8.8
1982 1st Q ..	2,520,221	11,297	8.1	7.7
2nd Q ..	2,556,141	11,515	7.2	7.9
3rd Q ..	2,584,721	11,738	4.1	6.9
4th Q ..	2,625,286	11,765	4.7	5.0
1983 1st Q ..	2,650,509	12,028	5.2	6.5
2nd Q ..	2,709,137	12,250	6.0	6.4

1/ Seasonally adjusted, annual rates.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, October 1983.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE UNITED STATES AND HAWAII (ANNUAL DATA SERIES): 1970 TO 1982

[In millions of dollars.]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970 ..	803,922	3,566	689,190	2,974
1975 ..	1,258,643	5,785	1,090,778	5,000
1980 ..	2,165,315	9,900	1,822,850	8,404
1981 ..	2,434,988	10,836	2,040,564	9,184
1982 ..	2,578,622	11,579	2,170,556	9,936
	Percent change from previous year			
1980 ..	11.0	13.5	10.9	13.5
1981 ..	12.5	9.3	11.9	9.3
1982 ..	5.9	6.6	6.4	8.2

1/ These represent the latest official annual data. More recently published quarterly data may not be consistent with these annual figures.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, August 1983.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS FOR HONOLULU: 1980 TO 1983

[1967=100]

Month and year	All items	Food	Housing	Apparel and upkeep	Trans-portation	Medical care
1980	228.5	259.9	216.6	183.9	223.6	258.6
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1981						
February	243.3	280.3	229.8	190.8	239.9	272.0
April	250.0	284.8	238.5	190.5	244.7	280.6
June	252.8	286.2	242.0	190.2	247.7	286.9
August	256.6	288.4	245.6	193.7	250.9	297.6
October	259.3	290.6	246.7	199.7	252.1	303.7
December	258.3	289.4	244.1	198.2	253.9	305.8
1982						
February	262.0	296.7	248.0	199.4	253.2	307.0
April	263.3	296.5	249.1	201.0	252.0	320.7
June	269.0	298.9	258.3	202.7	254.7	323.3
August	269.4	299.7	256.8	200.8	258.9	327.7
October	275.2	301.2	265.9	202.9	258.9	336.1
December	269.9	303.0	254.6	203.4	256.3	339.5
1983 1/						
February	270.4	304.8	255.0	205.5	251.0	349.0
April	272.8	307.1	257.8	208.7	249.4	355.4
June	271.4	306.1	254.5	205.5	250.0	355.9
August	273.5	307.7	255.5	209.1	254.3	365.5
October	276.4	308.4	260.2	210.0	258.2	362.7
Percent increase:						
1980 to 1981 .	10.5	10.0	10.9	5.2	10.5	11.9
1981 to 1982 .	6.0	4.5	6.1	4.2	3.4	12.1
Oct. 1982 to Oct. 1983 ..	0.4	2.3	-2.1	3.5	-0.3	7.9

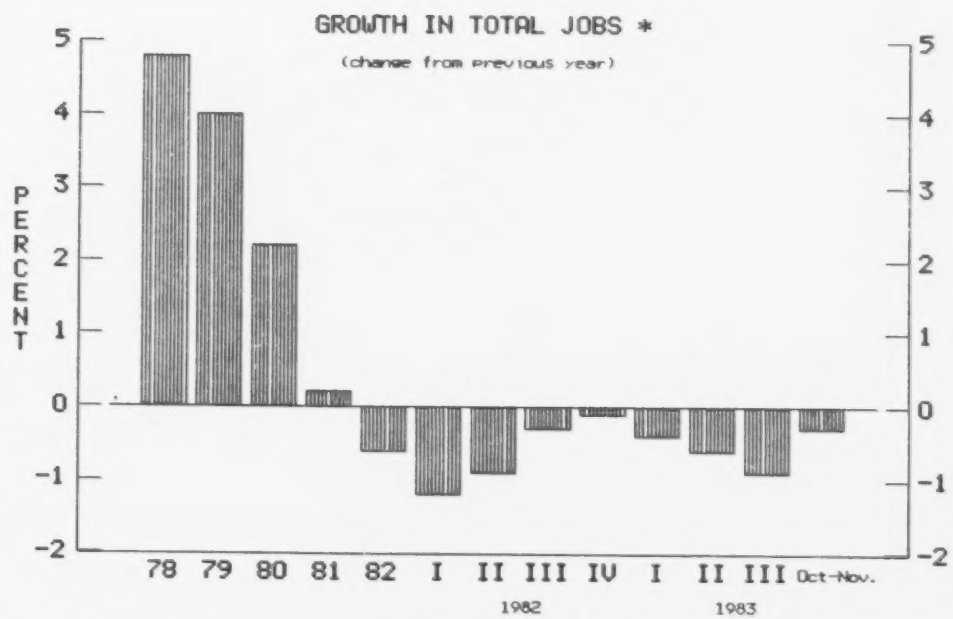
1/ Change in calculation--housing costs measured in rental equivalence (what owners would have to pay if they rented their homes).

Source: U.S. Department of Labor, Bureau of Labor Statistics.

4. Employment

The total number of jobs in the State for the first eleven months of 1983 fell 0.5 percent below the previous year's level. A decline of 0.3 percent was registered in the October-November 1983 period from a year before. Construction showed the greatest decline for the first ten months of 1983 with the number of jobs in that industry falling 6.6 percent below the comparable 1982 period. Also showing notable declines for the first ten months of 1983 were transportation/communication/utilities, down 4.1 percent, manufacturing, down 3.1 percent, and agriculture, down 3.1 percent.

Figure 4-1



*Total of Non.Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non.Ag. Self Employed Persons and Labor Disputes.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1983

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,200	428,550	404,100	24,450	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	442,350	427,000	401,100	25,900	15,250	11,300	4,000	100
1982								
1st Q ...	439,400	425,500	400,750	24,750	13,900	9,850	4,050	0
2nd Q ...	443,250	428,100	401,950	26,150	15,100	11,400	3,700	50
3rd Q ...	444,100	427,700	400,950	26,750	16,350	12,500	3,850	50
4th Q ...	442,600	426,700	400,750	25,950	15,700	11,350	4,350	200
1983 (p)								
1st Q ...	437,700	424,250	398,450	25,800	13,450	9,850	3,600	0
2nd Q ...	440,850	426,200	399,700	26,500	14,550	11,050	3,500	100
3rd Q ...	440,300	424,500	397,250	27,250	15,650	11,900	3,750	350
Oct-Nov .	440,650	425,300	398,550	26,750	15,250	10,950	4,300	100
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.4	-1.6	-1.6	5.6	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.4	-3.1	-90.0
1982	-0.6	-0.4	-0.9	6.6	-4.1	-2.5	-8.8	100.0
1982								
1st Q ...	-1.2	-1.1	-1.4	3.3	-5.2	0.3	-10.4	-100.0
2nd Q ...	-0.9	-0.7	-1.2	7.3	-7.0	-0.6	-7.9	-
3rd Q ...	-0.3	-0.1	-0.6	8.4	-5.7	-8.0	-12.5	-78.0
4th Q ...	-0.1	0.0	-0.5	7.3	-2.9	-1.4	-4.4	117.0
1983 (p)								
1st Q ...	-0.4	-0.3	-0.6	4.2	-3.1	0.2	-10.3	0.0
2nd Q ...	-0.6	-0.5	-0.6	1.3	-3.6	-3.2	-5.4	100.0
3rd Q ...	-0.9	-0.8	-0.9	1.8	-4.3	-4.8	-2.2	600.0
Oct-Nov .	-0.3	-0.4	-0.3	2.7	-4.4	-5.2	-3.4	-71.4

p Preliminary.

NOTE: Data rounded to nearest 50 and detail may not add to totals due to rounding.

1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.

Source: State Department of Labor and Industrial Relations and Department of Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1983

Series	Jan.-Nov. (p)	Oct.-Nov. (p)	Percent change from previous year: Jan.-Nov. (p)	Percent change from previous year: Oct.-Nov. (p)
Total jobs 1/	439,850	440,650	-0.5	-0.3
Non-agricultural	398,450	398,550	-0.6	-0.3
Construction	16,850	16,750	-6.6	-1.8
Manufacturing	21,850	21,150	-3.1	-1.9
Food processing	11,350	10,700	0.9	1.9
Transp., commun., utilities	30,400	30,150	-4.1	-5.2
Trade	106,450	107,250	0.7	1.3
Wholesale	19,200	19,150	1.9	1.1
Retail	87,250	88,100	0.5	1.3
Finance, insur., & real estate	31,550	31,350	-0.5	-0.2
Services	100,500	100,900	-0.6	-0.1
Hotels	26,150	26,500	-1.5	-0.6
Government	90,900	91,050	0.9	-0.2
Federal	32,100	32,000	2.1	0.0
State	45,450	46,450	0.1	-0.1
Local	13,350	12,600	-1.1	-0.8
Agriculture (wage & salary)	10,950	10,950	-3.1	-5.2
Sugar	4,550	4,400	-3.2	-7.4
Pineapple	2,350	1,850	-6.0	2.8
Diversified agriculture	4,050	4,700	-1.2	-6.4
Non-agricultural self-employed 2/	26,550	26,750	2.5	2.7
Agricultural self-employed 2/	3,750	4,300	-5.1	-3.4
Labor disputes	150	100	50.0	-71.4

p Preliminary.

1/ Total of non-agricultural and agricultural wage and salary, self-employed and jobs involved in labor disputes.

2/ Self-employed includes unpaid family workers and domestics.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1983

[Number of jobs.]

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	401,100	327,250	28,700	15,050	30,050
1982					
1st Q	400,750	326,700	29,050	15,250	29,750
2nd Q	401,950	328,300	28,550	15,050	30,100
3rd Q	400,950	326,650	28,750	15,250	30,300
4th Q	400,750	327,400	28,600	14,700	30,100
1983 (p)					
1st Q	398,450	325,150	28,350	14,800	30,150
2nd Q	399,650	326,600	28,250	14,750	30,200
3rd Q	397,250	324,250	28,100	14,850	30,050
Oct-Nov ...	398,550	326,200	28,200	14,450	29,700
	Percent change from same period in previous year				
1980	2.5	2.2	2.9	6.1	4.0
1981	-0.2	-0.2	1.4	0.6	3.5
1982	-0.9	-1.5	-0.4	-1.1	5.7
1982					
1st Q	-1.4	-2.1	1.7	-0.7	4.3
2nd Q	-1.2	-2.0	-0.1	0.2	6.1
3rd Q	-0.6	-1.2	-1.5	-0.7	6.8
4th Q	-0.5	-0.8	-1.6	-3.2	5.5
1983 (p)					
1st Q	-0.6	-0.5	-2.3	-3.0	1.3
2nd Q	-0.6	-0.5	-1.1	-2.1	0.3
3rd Q	-0.9	-0.7	-2.1	-2.8	-0.9
Oct-Nov ...	-0.3	0.0	1.1	-3.8	-0.8

p Preliminary.

NOTE: Data are rounded to nearest 50 and detail may not add to total due to rounding.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1983

[Number of persons.]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	339,550	41,800	20,000	36,650
1981	450,000	345,950	44,300	20,650	39,150
1982	458,000	351,100	44,950	21,000	41,950
1982					
1st Q	455,500	349,500	44,550	21,000	40,500
2nd Q	461,900	354,250	44,750	21,050	41,850
3rd Q	459,950	350,100	45,400	21,300	43,150
4th Q	458,650	350,650	45,150	20,650	42,250
1983					
1st Q	462,750	354,750	44,650	20,900	42,450
2nd Q	464,700	355,600	45,150	20,850	43,100
3rd Q	464,350	354,400	45,250	21,100	43,600
Oct-Nov	466,950	358,350	45,350	20,600	42,650
Civilian employment					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	323,950	39,200	19,050	34,750
1981	426,000	328,850	40,850	19,450	36,800
1982	428,000	329,600	40,500	19,300	38,600
1982					
1st Q	425,500	328,250	40,450	19,350	37,500
2nd Q	430,350	332,150	40,000	19,350	38,850
3rd Q	429,000	328,700	40,800	19,650	39,850
4th Q	427,150	329,200	40,800	18,800	38,300
1983					
1st Q	436,550	336,950	40,850	19,400	39,350
2nd Q	434,200	334,950	40,400	19,200	39,700
3rd Q	433,650	333,250	40,850	19,400	40,150
Oct-Nov	438,850	338,500	42,000	19,100	39,300

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1983

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons)					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,600	950	1,900
1981	24,000	17,050	3,400	1,200	2,300
1982	31,100	21,500	4,450	1,700	3,300
1982					
1st Q	29,950	21,200	4,100	1,650	3,050
2nd Q	31,550	22,100	4,800	1,750	2,950
3rd Q	30,950	21,400	4,600	1,650	3,300
4th Q	31,500	21,400	4,300	1,850	3,950
1983					
1st Q	26,200	17,800	3,800	1,500	3,100
2nd Q	30,500	20,700	4,750	1,650	3,450
3rd Q	30,700	21,150	4,400	1,700	3,450
Oct-Nov	28,050	19,900	3,350	1,500	3,350
Unemployment rate (percent)					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.2	4.6	5.2
1981	5.4	4.9	7.7	5.9	5.9
1982	6.7	6.1	9.9	8.1	7.9
1982					
1st Q	6.6	6.1	9.2	7.9	7.5
2nd Q	6.8	6.2	10.7	8.3	7.0
3rd Q	6.7	6.1	10.1	7.7	7.6
4th Q	6.9	6.1	9.5	9.0	9.3
1983					
1st Q	5.7	5.0	8.5	7.2	7.3
2nd Q	6.7	5.8	10.5	7.9	8.0
3rd Q	6.6	6.0	9.7	8.1	7.9
Oct-Nov	6.0	5.5	7.4	7.3	7.9

Source: Hawaii State Department of Labor and Industrial Relations.

5. Business Activity and Tax Revenues

Total taxable transactions in the State through the first ten months of 1983 increased 4.3 percent over the same 1982 period, well ahead of the rate of increase in Honolulu consumer prices. Third quarter data for transactions show marked improvement over earlier first quarter results, especially in manufacturing and hotel rentals.

General fund tax revenues in the October-November period increased 14.9 percent from the same 1982 months. General excise tax revenue increased 14.0 percent in the October-November period, net individual income tax collections rose 5.7 percent and net corporate tax collections increased 52.0 percent from the year before.

Figure 5-1

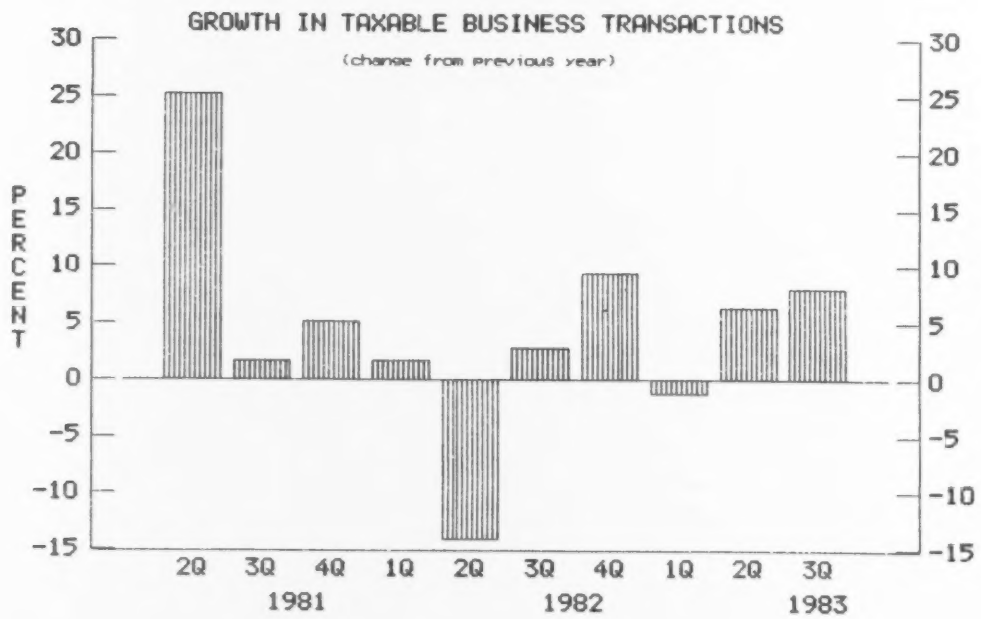


Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1983 1/

[Millions of dollars.]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manufacturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1981						
1st Q	5,122.0	1,706.3	447.6	200.6	39.8	148.7
2nd Q	6,042.0	1,772.0	501.5	220.6	55.1	191.8
3rd Q	5,053.3	1,674.3	438.7	182.2	39.7	152.7
4th Q	4,689.0	1,538.1	404.2	156.0	38.7	122.6
1982						
1st Q	5,210.7	1,794.9	488.3	244.7	50.2	149.9
2nd Q	5,187.4	1,812.8	511.1	214.4	44.3	149.9
3rd Q	5,194.7	1,729.6	477.0	215.2	40.2	126.8
4th Q	5,129.3	1,706.3	499.7	201.2	42.2	117.6
1983 (Jan-Oct)	18,112.7	6,285.2	1,793.0	739.3	186.6	427.9
1st Q	5,141.5	1,813.8	498.9	224.3	54.3	109.6
2nd Q	5,514.8	1,907.3	566.7	219.2	58.7	125.3
3rd Q	5,609.6	1,934.2	551.6	224.1	54.4	143.2
Oct	1,846.9	630.0	175.8	71.8	19.1	49.8
	Percent change from same period in previous year					
1981	10.2	10.1	2.4	5.4	25.0	-0.7
1st Q	8.7	8.7	9.4	-4.9	80.9	-8.6
2nd Q	25.2	15.9	7.3	26.4	29.6	27.9
3rd Q	1.7	10.3	-9.6	-3.7	9.2	-12.2
4th Q	5.1	5.4	4.1	6.7	-4.3	-8.1
1982	-0.9	5.3	10.3	15.3	2.0	-11.6
1st Q	1.7	5.2	9.1	22.0	26.1	0.8
2nd Q	-14.1	2.3	1.9	-2.8	-19.6	-21.9
3rd Q	2.8	3.3	8.7	18.1	1.3	-17.0
4th Q	9.4	10.9	23.6	29.1	9.0	-4.1
1983 (Jan-Oct)	4.3	6.5	9.7	0.0	25.8	-9.0
1st Q	-1.3	1.1	2.2	-8.3	8.2	-26.9
2nd Q	6.3	5.2	10.9	2.2	39.6	-5.2
3rd Q	8.0	11.8	15.6	4.1	35.3	12.9
Oct	3.7	11.6	10.8	10.8	40.0	14.3

NA Not available.
1/ Data lagged one month to account for reporting delay.
Source: Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1970 TO 1983

[Thousands of dollars.]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State general fund 3/
1970	172,289	112,019	13,241	337,216
1975	301,475	178,922	37,310	585,701
1978	392,236	239,587	25,597	749,216
1979	466,535	287,163	37,771	890,434
1980	527,304	335,670	43,912	1,008,750
1981	575,216	349,643	43,594	1,070,895
1982	574,590	296,757	34,785	1,011,465
1982 1st Q	141,147	85,670	10,512	248,406
2nd Q	147,532	12,566	15,604	219,138
3rd Q	151,149	98,191	7,295	284,382
4th Q	134,762	100,330	1,374	259,539
1983 1st Q	155,780	94,313	6,456	267,914
2nd Q	159,436	54,183	9,343	270,680
3rd Q	151,498	107,922	11,330	295,506
Oct-Nov ..	103,043	68,360	1,451	181,288
	Percent change from corresponding period in previous year			
1978	11.4	12.9	11.2	11.5
1979	18.9	19.9	47.6	18.8
1980	13.0	16.9	16.3	13.3
1981	9.1	4.2	-0.7	6.1
1982	-0.1	-15.1	-20.2	-5.5
1982 1st Q	4.8	2.9	4.7	1.7
2nd Q	-3.1	-84.6	-23.3	-25.6
3rd Q	2.1	5.8	-24.8	5.0
4th Q	-3.9	9.1	-60.7	-0.6
1983 1st Q	10.4	10.1	-38.6	7.9
2nd Q	8.1	331.2	-40.1	23.5
3rd Q	0.2	9.9	55.3	3.9
Oct-Nov ..	14.0	5.7	52.0	14.9

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

6. The Visitor Industry

The total number of visitors to Hawaii during the first ten months of the year increased a modest 2.4 percent from the same 1982 period. Westbound visitors from the U.S. Mainland and Canada were up 3.7 percent in the number of the first ten months while eastbound visitors from the Orient and Pacific declined 1.8 percent from 1982.

For the Neighbor Island Counties of Hawaii and Maui, the first ten months of 1983 saw increased numbers of westbound visitors of 6.5 percent and 6.7 percent respectively. On Kauai the westbound total continued to suffer the after effects of Hurricane Iwa publicity, with visitors down 8.7 percent in number for the first ten months of 1983.

Figure 6-1

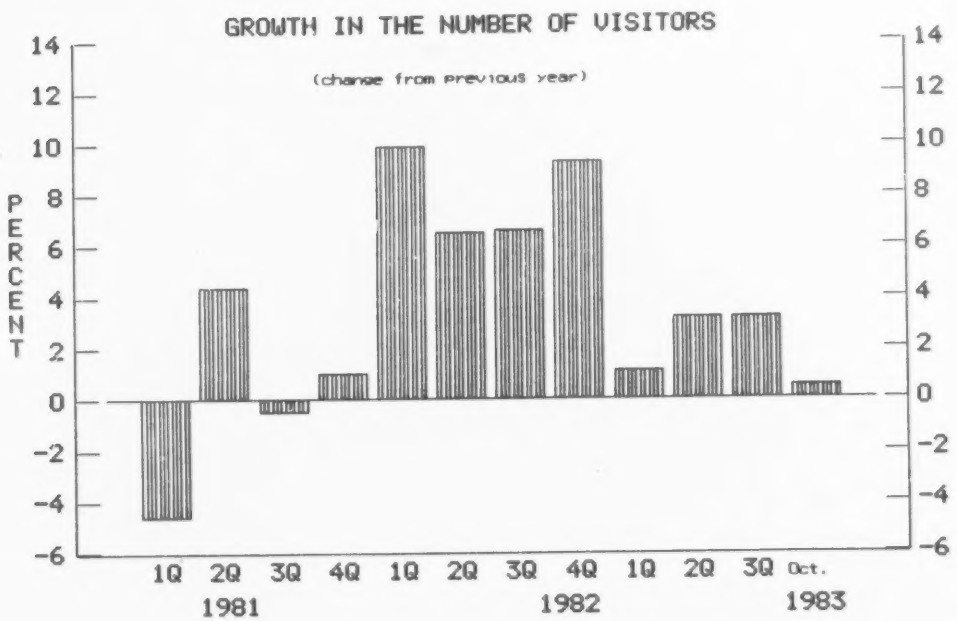


Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1970 TO 1983

Year	Visitors staying Overnight or longer			Average number present	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1970	1,746,970	1,326,135	420,835	32,028	36,943
1975	2,829,105	2,207,417	621,688	59,495	66,308
1978	3,670,309	3,030,999	639,310	85,028	92,034
1979	3,960,531	3,139,455	821,076	89,678	98,676
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,576	96,095
1982	4,242,916	3,278,519	964,397	94,484	106,374
1982 1st Q	1,054,042	827,977	226,065	104,790	116,093
2nd Q	1,048,674	795,858	252,816	86,736	99,376
3rd Q	1,110,729	865,577	245,152	98,547	110,538
4th Q	1,029,471	789,107	240,364	88,004	99,761
1983 Jan-Oct (p) ..	3,644,723	2,852,471	792,252	(NA)	(NA)
1st Q	1,069,945	845,441	224,504	(NA)	(NA)
2nd Q (p)	1,082,474	838,537	243,937	(NA)	(NA)
3rd Q (p)	1,146,170	903,447	242,723	(NA)	(NA)
Oct (p)	346,134	265,046	81,088	(NA)	(NA)
	Percent change from corresponding period in previous year				
1978	6.9	9.7	-4.6	12.3	10.8
1979	7.9	3.6	28.4	5.5	7.2
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.4	10.7
1982 1st Q	9.9	12.9	0.1	15.8	15.5
2nd Q	6.5	7.5	3.5	8.8	9.7
3rd Q	6.6	9.4	-2.8	8.0	8.4
4th Q	9.3	11.1	0.7	11.1	11.7
1983 Jan-Oct (p) ..	2.4	3.7	-1.8	-	-
1st Q	1.4	1.9	-0.5	-	-
2nd Q (p)	3.2	5.4	-3.5	-	-
3rd Q (p)	3.2	4.4	-1.0	-	-
Oct (p)	0.5	1.4	-2.5	-	-

p Preliminary.
NA Not available.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS BY COUNTY: 1970 TO 1983

Year 1/	Westbound visitors by County			
	City and County of Honolulu	Hawaii	Maui	Kauai
1970 (unrevised)	1,066,395	445,401	447,985	410,075
1975 (unrevised)	1,889,792	769,779	931,863	632,821
1978 (unrevised)	2,494,893	908,983	1,403,054	837,712
1979 (unrevised)	2,542,717	860,940	1,419,773	825,366
1980 (unrevised).....	2,398,737	761,103	1,378,189	781,409
1981 (revised)	2,398,477	672,683	1,389,892	757,811
1982 (revised)	2,702,655	703,901	1,608,222	760,549
1982: 1st Q	671,904	179,007	416,270	189,608
2nd Q	666,265	163,610	384,670	197,938
3rd Q	727,437	179,392	407,318	208,740
4th Q	637,049	181,892	399,964	164,263
1983: Jan-Oct (p) ..	2,275,774	620,555	1,436,299	606,685
1st Q	660,635	198,116	426,926	154,800
2nd Q (p)	680,651	169,517	411,261	177,914
3rd Q (p)	728,618	188,904	453,364	207,183
Oct (p)	205,870	64,018	144,748	66,788
	Percent change from corresponding period in previous year			
1978	8.7	8.3	11.6	13.1
1979	1.9	-5.3	1.2	-1.5
1980	-5.7	-12.0	-3.0	-5.3
1981 1/	(NA)	(NA)	(NA)	(NA)
1982 1/	12.7	4.9	15.6	0.5
1982: 1st Q	17.3	4.3	18.6	5.3
2nd Q	11.8	1.1	10.9	1.6
3rd Q	10.4	2.7	12.7	2.4
4th Q	11.6	10.5	20.8	-8.3
1983: Jan-Oct (p) ..	-0.2	6.5	6.7	-8.7
1st Q	-1.7	10.5	2.4	-18.6
2nd Q (p)	2.2	3.6	6.9	-10.1
3rd Q (p)	0.2	5.3	11.3	-0.7
Oct (p)	-3.8	5.1	5.4	-1.9

p Preliminary.

1/ 1981 and 1982 data have been revised and are not comparable to previous years.

Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1983

[Survey does not include some large hotel chains.]

Date	State	Waikiki	Hawaii	Kauai	Maui
Annual average:					
1970	71.2	74.1	68.3	58.0	66.7
1975	74.1	78.3	59.9	77.2	72.3
1978	79.5	82.1	65.0	83.3	80.4
1979	73.8	77.1	62.0	76.5	73.0
1980	69.3	71.7	52.7	69.6	66.2
1981	68.2	73.9	44.9	62.7	70.3
1982	70.4	77.7	44.0	57.5	73.9
1983 (Jan-Nov) .	70.1	77.5 1/	45.3	58.2	76.3
1982					
January	67.7	76.5	36.7	50.4	66.6
February	85.8	94.2	59.8	70.1	89.3
March	83.8	93.6	51.3	68.2	89.2
April	68.2	74.3	42.0	55.9	74.6
May	61.8	66.9	38.9	54.7	64.3
June	67.6	75.4	37.5	61.2	67.5
July	71.2	80.6	46.2	63.5	74.4
August	74.1	80.7	55.8	61.2	74.0
September	67.3	75.9	38.1	56.7	67.5
October	67.3	74.5	44.7	51.9	70.6
November	75.0	74.5	45.2	47.5	75.8
December	64.6	70.0	41.3	43.3	67.9
1983					
January	63.4	70.3	41.8	43.8	65.7
February	80.8	90.3	55.0	63.3	88.7
March	79.9	87.9	49.7	57.6	88.1
April	65.3	71.2	40.8	47.8	72.9
May	63.3	69.6	36.9	55.0	69.8
June	74.6	81.6	43.7	66.1	79.1
July	73.3	81.9	45.1	64.0	73.5
August	75.3	80.2	49.9	66.8	83.1
September	66.1	71.9	40.7	62.5	68.7
October	65.7	70.9	51.0	61.1	77.3
November	64.9	(NA)	45.3	51.7	73.0

NA Not available.

1/ January to October only.

Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company from 1981.

Table 6-4.-- EXISTING HOTEL UNITS: 1970 TO 1983

(Number of units.)

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110

Source: Hawaii Visitors Bureau.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES, BY ISLANDS: 1970 TO 1983

[Dollars.]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	-	-	-	-
1975	29.75	-	-	-	-
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
(Jan-Nov)	51.95	44.74	47.25	75.58	58.94
1983 (Jan-Nov)	54.68	46.88	48.76	81.20	59.43
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983 (Jan-Nov)	5.3	4.8	3.2	7.4	0.8

Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

7. Construction

As figure 7-1 indicates, Hawaii's construction industry turned around from a seven-quarter decline in dollar receipts in the second quarter of 1983 and positive growth in the current dollar value of construction has been experienced since.

The value of new private building permits issued in the third quarter of 1983 showed a 23.8 percent decline from the year before. The main reason for this percentage decline was the exceptionally high value of permits issued in the third quarter of 1982 with which the 1983 third quarter figures were compared.

Table 7-7 shows that the sharp increase in single-family home construction in 1983 caused a surge in the Honolulu Construction Cost Index for single-family type construction. For 1983, the index averaged 8.8 percent higher than in 1982. The high-rise construction cost index was 6.6 percent above the 1982 level.

Figure 7-1

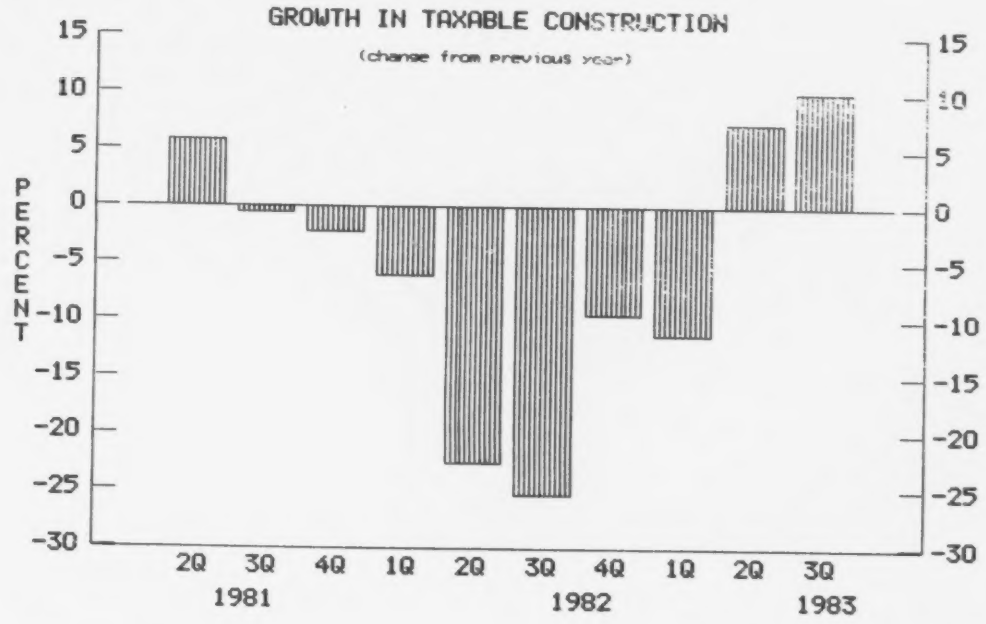


Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1983

[Millions of dollars.]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1980	1,569.7	1,219.2	680.2	331.5	207.5	230.6
1981	1,584.7	802.0	398.3	240.8	162.9	427.5
1982	1,323.9	683.1	299.2	242.9	141.1	392.7
1983	(NA)	(NA)	(NA)	(NA)	(NA)	277.9
1982 1st Q ...	358.9	93.3	40.0	27.7	25.6	67.3
2nd Q ...	335.0	135.7	52.5	38.4	44.9	128.6
3rd Q ...	310.9	277.4	110.8	131.4	35.2	104.3
4th Q ...	319.1	176.7	95.9	45.4	35.3	92.5
1983 1st Q ...	318.5	117.3	57.4	24.2	41.4	98.4
2nd Q ...	359.4	156.9	66.9	33.8	56.3	23.7
3rd Q ...	342.3	211.4	117.9	41.7	45.8	71.6
4th Q 4/	114.9 3/	126.0	40.8	52.3	32.9	84.2
	Percent change from corresponding period in previous year					
1980	16.9	39.3	27.1	53.8	67.2	-40.7
1981	1.0	-34.2	-41.4	-27.4	-21.5	85.4
1982	-16.5	-14.8	-24.9	0.9	-13.4	-8.1
1982 1st Q ...	-6.1	-58.9	-61.1	-65.9	-40.6	-38.5
2nd Q ...	-22.6	-49.0	-71.0	-23.7	29.0	148.7
3rd Q ...	-25.4	63.9	56.3	183.8	-32.4	24.1
4th Q ...	-9.5	26.7	120.0	-27.9	7.3	-49.3
1983 1st Q ...	-11.3	25.7	43.5	-12.6	61.7	41.8
2nd Q ...	7.3	15.6	27.4	-12.0	25.4	-81.6
3rd Q ...	10.1	-23.8	6.4	-63.7	30.1	-31.4
4th Q 4/	8.2 3/	17.0	28.9	120.1	23.8	-9.0

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

3/ October only.

4/ Only October and November data for private building authorizations.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1983

[Millions of dollars.]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1982 1st Q ...	93.3	50.3	13.7	14.6	14.7
2nd Q ...	135.7	76.7	35.6	11.1	12.4
3rd Q ...	277.4	201.6	12.4	11.1	52.3
4th Q ...	176.7	144.4	13.4	7.5	11.4
1983 1st Q ...	117.3	65.4	18.8	21.4	11.8
2nd Q ...	156.9	80.4	22.2	37.7	16.5
3rd Q ...	211.4	139.1	25.0	32.0	15.3
Oct-Nov .	126.0	58.3	13.9	10.9	42.9
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1982 1st Q ...	-58.9	-46.0	-74.6	-15.1	-62.8
2nd Q ...	-49.0	-59.7	103.4	-40.3	-68.6
3rd Q ...	63.9	122.6	-73.5	-22.3	198.9
4th Q ...	26.7	80.7	-26.4	-57.6	-42.1
1983 1st Q ...	25.7	30.0	37.2	46.5	-19.7
2nd Q ...	15.6	4.8	-37.6	239.6	34.6
3rd Q ...	-23.8	-31.1	101.6	188.6	-70.7
Oct-Nov .	17.0	-31.8	71.5	122.0	364.2

Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED: 1970 TO 1983

[Millions of dollars.]

	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1983	277.9	84.7	126.8	66.4
1982				
1st Q	67.3	21.2	27.7	18.3
2nd Q	128.6	78.4	37.1	13.1
3rd Q	104.3	5.9	81.1	17.4
4th Q	92.5	34.1	36.1	22.4
1983				
1st Q	98.4	11.7	53.7	33.1
2nd Q	23.7	5.7	8.4	9.6
3rd Q	71.6	16.9	37.0	17.7
4th Q	84.2	50.4	27.7	6.0
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1983	-29.3	-39.3	-30.3	-6.7
1982				
1st Q	-38.5	2.7	-62.6	25.9
2nd Q	148.7	353.2	43.2	54.1
3rd Q	24.1	-62.0	134.5	-48.9
4th Q	-49.3	-72.2	-21.4	63.5
1983				
1st Q	46.2	-44.8	93.9	80.7
2nd Q	-81.6	-92.3	-77.4	-26.7
3rd Q	-31.4	186.4	-54.4	1.7
4th Q	-9.1	47.8	-23.3	-73.3

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1983 1/

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1976	3,383	1,384	821	297	881
1977	4,891	2,281	1,074	445	1,091
1978	5,219	2,270	1,382	567	1,000
1979	6,181	3,156	1,445	556	1,024
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1982 1st Q	472	82	197	62	131
2nd Q	536	122	213	63	138
3rd Q	626	217	186	61	162
4th Q	651	304	204	44	99
1983 1st Q	896	471	242	57	126
2nd Q	952	502	212	73	165
3rd Q	862	396	240	80	146
Oct-Nov ..	508	190	176	57	85
	Percent change from corresponding period in previous year				
1978	6.7	0.5	28.7	27.4	-8.3
1979	18.4	39.0	4.6	-1.9	2.4
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1982 1st Q	-39.1	-65.0	-26.8	-54.7	-3.0
2nd Q	-23.1	-43.8	-23.7	-40.0	43.8
3rd Q	-1.9	23.3	-35.9	-14.1	60.3
4th Q	20.8	201.0	-2.9	-54.2	-25.0
1983 1st Q	89.8	474.4	22.8	-8.1	-8.7
2nd Q	77.6	311.5	-0.5	15.9	19.6
3rd Q	37.7	82.5	29.0	31.1	-9.9
Oct-Nov ..	7.6	-11.6	18.9	72.8	11.8

1/ Includes duplexes.
Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED BY COUNTY: 1970 TO 1983 1/

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1976	3,751	3,397	129	4	221
1977	3,129	2,389	129	83	528
1978	4,236	1,968	334	610	1,324
1979	6,351	1,804	718	1,125	2,704
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1982 1st Q	313	73	0	118	122
2nd Q	182	6	176	0	0
3rd Q	1,831	1,776	55	0	0
4th Q	2,268	2,254	14	0	0
1983 1st Q	11	0	11	0	0
2nd Q	168	149	0	9	10
3rd Q	1,058	967	27	64	0
Oct-Nov ...	104	104	0	0	0
	Percent change from corresponding period in previous year				
1978	39.1	-1.8	158.9	-	150.8
1979	49.9	-8.3	115.0	84.4	104.2
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1982 1st Q	-57.8	-52.9	-100.0	156.5	-76.5
2nd Q	-90.3	-100.0	-	-100.0	-100.0
3rd Q	347.7	3,936.0	-77.9	-100.0	-100.0
4th Q	1,889.5	2,200.0	-	-	-100.0
1983 1st Q	-96.5	-100.0	-	-100.0	100.0
2nd Q	-7.7	2,383.3	-100.0	-	-
3rd Q	-42.2	-45.6	-50.9	-	0
Oct-Nov ...	-94.3	-94.3	0	0	0

1/ Three or more units per structure.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1983

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1976	21,400	36.2	19,350	5,650	22.6	8.80
1977	19,750	35.7	17,650	4,150	19.1	9.87
1978	20,650	36.6	18,900	2,500	11.7	10.53
1979	23,400	36.0	21,050	1,700	7.5	11.05
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	22,300	36.1	20,150	3,500	14.8	13.18
1982	18,950	35.2	16,700	4,000	19.3	14.42
1982 1st Q ..	20,350	34.5	17,550	4,750	21.3	13.98
2nd Q ..	19,200	35.6	17,100	4,200	19.7	14.21
3rd Q ..	18,600	37.5	17,500	3,650	17.3	14.26
4th Q ..	17,750	33.1	14,700	3,450	19.0	15.21
1983 1st Q ..	17,200	38.6	16,600	2,850	14.7	15.53
2nd Q ..	16,850	37.6	15,850	(NA)	(NA)	15.64
3rd Q ..	16,600	38.0	15,750	(NA)	(NA)	15.81
	Percent change from corresponding period in previous year					
1975	-5.6	0.3	-5.3	66.0	-	8.3
1976	-18.8	-4.5	-22.4	36.1	-	12.7
1977	-7.7	-1.4	-8.8	-26.5	-	12.2
1978	4.6	2.5	7.1	-39.8	-	6.7
1979	13.3	-1.6	11.4	-32.0	-	4.9
1980	2.4	0.6	3.1	55.9	-	7.2
1981	-6.9	-0.3	-7.1	32.1	-	11.2
1982	-15.0	-2.5	-17.1	14.3	-	9.4
1982 1st Q ..	-11.3	-11.3	-21.3	58.3	-	9.4
2nd Q ..	-14.-	2.3	-12.5	21.7	-	9.5
3rd Q ..	-16.8	3.3	-13.8	4.3	-	8.4
4th Q ..	-17.3	-3.5	-20.1	-13.8	-	10.2
1983 1st Q ..	-15.5	11.9	-5.4	-40.0	-	11.1
2nd Q ..	-6.9	5.6	-7.3	-	-	10.1
3rd Q ..	-10.8	1.3	-10.0	-	-	10.9

NA Not available.

1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.

2/ Equivalent number of jobs if all workers had worked a 40-hour week.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1983

[1967=100.]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1979	266.2	248.3	288.8	264.3	237.6	287.5
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1983 (p) .	331.4	276.5	400.7	352.1	294.6	401.9
1982						
March ..	301.2	250.1	365.6	326.5	281.4	365.6
June ...	301.5	249.0	367.6	326.4	279.5	367.0
Sept. ..	310.4	249.1	387.9	339.1	281.3	389.1
Dec. ...	314.2	253.9	390.3	342.6	286.0	391.7
1983						
March ..	324.0	267.7	395.0	348.7	292.4	397.4
June ...	336.6	288.9	396.8	351.5	297.1	398.6
Sept. ..	338.2	282.6	408.4	355.4	296.7	406.3
Dec. (p)	339.5	282.7	411.1	358.8	296.7	412.7
	Percent change from corresponding period in previous year					
1979	9.4	13.5	5.2	9.5	16.1	5.3
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1983 (p) .	8.8	10.3	7.4	6.6	4.7	7.8
1982						
March ..	4.4	-1.6	10.1	7.2	3.5	9.9
June ...	5.0	-0.5	10.2	7.1	2.8	10.0
Sept. ..	4.5	-2.2	10.7	7.9	3.0	11.2
Dec. ...	6.0	1.0	10.6	7.5	1.7	11.4
1983						
March ..	7.6	7.0	8.0	6.8	3.9	8.7
June ...	11.6	16.0	7.9	7.7	6.3	8.6
Sept. ..	9.0	13.4	5.3	4.8	5.5	4.4
Dec. (p)	8.1	11.3	5.3	4.7	3.7	5.4

1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

8. Major Sources of Income

Defense expenditure reports available for 1983 indicate about a 8.5 percent increase in defense spending in the State for the first nine months. Defense expenditures in Hawaii during 1982 rose almost 17 percent from the 1981 level.

The value of processed sugar shipments to the Mainland for the first ten months of the year registered a 35 percent increase over the same 1982 period. Shipments of canned pineapple, however, declined 11 percent in the first ten months of 1983.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1982

[Millions of dollars.]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1971	705	708.8	202.9	141.4
1972	840	744.2	184.7	145.4
1973	1,020	840.9	222.2	142.4
1974	1,225	897.9	676.6	127.1
1975	1,360	982.9	366.1	136.7
1976	1,640	1,034.2	257.0	144.5
1977	1,845	1,086.6	226.8	161.6
1978	2,146	1,155.5	285.2	162.9
1979	2,537	1,221.7	345.7	206.4
1980	2,875	1,317.4	594.1	226.5
1981	3,200(p)	1,449.3	327.9	217.6
1982	3,700(p)	1,693.4	351.5	206.0

NA Not available. (p) Preliminary.
1/ Includes value of molasses.
Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaiian Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1983 1/

[Millions of dollars.]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1982					
1st Q	402.3	211.0	142.7	41.1	7.4
2nd Q	411.9 2/	208.9	151.1	44.5	7.4
3rd Q	443.4	223.7	168.9	43.3	7.5
4th Q	435.9	234.6	148.8	44.8	7.6
1983					
1st Q	(NA)	230.7	187.3	43.8	(NA)
2nd Q	(NA)	237.7	163.1	45.5	(NA)
3rd Q	(NA)	229.9	178.2	47.9	(NA)
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1982					
1st Q	18.0	18.8	19.7	7.6	23.3
2nd Q	21.1	15.9	29.4	22.9	10.4
3rd Q	19.4	12.9	33.1	8.7	13.6
4th Q	9.9	9.4	13.7	1.6	2.7
1983					
1st Q	-	7.6	31.3	6.6	-
2nd Q	-	13.8	7.9	2.2	-
3rd Q	-	2.8	5.5	10.6	-

NA Not available.

1/ Includes all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

2/ Estimated.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- DEFENSE EXPENDITURES BY TYPE: 1975 TO 1982

[In thousands of dollars.]

Year	All categories	Military payroll	Civilian payroll	Supplies, equipment, services
1975	982,779	396,413	281,955	304,411
1976	1,034,226	420,051	301,347	312,828
1977	1,086,561	432,754	325,778	328,029
1978	1,155,517	465,449	354,530	335,538
1979	1,221,784	497,840	372,596	351,348
1980	1,317,402	533,691	418,759	364,952
1981	1,449,328	612,761	450,684	385,883
1982	1,693,410	716,841	508,569	468,000
1981				
1st Q	341,077	140,739	99,430	100,908
2nd Q	339,978	145,968	102,400	91,610
3rd Q	371,505	153,370	118,081	100,054
4th Q	396,768	172,684	130,773	93,311
1982				
1st Q	402,261	171,636	114,745	115,880
2nd Q	411,937	174,203	119,919	117,814
3rd Q	443,359	183,370	131,515	128,474
4th Q	435,854	187,632	142,390	105,832

Source: Quarterly reports from the armed forces.

Table 8-4.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1983 1/

Year	Value of shipments 2/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 3/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1981				
1st Q	124.2	26.8	47.3	-9.3
2nd Q	121.6	50.1	-19.2	-2.2
3rd Q	84.4	64.0	-48.2	-11.1
4th Q	62.4	28.9	-57.8	-24.3
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	43.1	47.4	49.1
1983 (Jan-Oct)	378.0	143.5	35.4	-11.1
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
3rd Q	136.2	50.9	35.4	-19.3
October ...	36.0	19.6	2.9	28.2

NA Not available.

1/ These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 25, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

2/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

3/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- CURRENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period 2/	Number	Percent change	
				From preceding period	From same period in previous year
Resident population 3/					
State	Persons	July 1, 1982	994,000	-	1.5
City and County of Honolulu	Persons	July 1, 1982	775,200	-	1.0
Hawaii County	Persons	July 1, 1982	98,000	-	2.3
Kauai County	Persons	July 1, 1982	40,800	-	2.0
Maui County	Persons	July 1, 1982	79,800	-	5.7
Income					
Total personal income 3/	$ Million	2nd Quarter	12,250	1.8	6.4
Consumer price index (Honolulu)					
All items	(1967=100)	October	276.4	1.1 4/	0.4
Food prices	(1967=100)	October	308.4	0.2 4/	2.3
Construction					
Total private permits	$ Million	3rd Quarter	211.4	34.7	-23.8
Total residential permits	$ Million	3rd Quarter	117.9	76.2	6.4
New single-family units	Number	3rd Quarter	862	-9.5	37.7
New multi-family units	Number	3rd Quarter	1,058	529.8	-42.2
Government contracts awarded	$ Million	4th Quarter	84.2	17.5	-9.1
Construction cost indexes (Hon.)					
Single family	(1967=100)	December	339.5	0.1 5/	8.1
High-rise buildings	(1967=100)	December	358.8	0.2 5/	4.7
Employment (p)					
Total civilian labor force	Persons	3rd Quarter	464,350	-0.1	0.1
Civilian employment	Persons	3rd Quarter	433,650	-0.1	1.1
Civilian unemployment	Persons	3rd Quarter	30,700	6.6	-0.8
Unemployment rate	Percent	3rd Quarter	6.6	-	-
Total jobs	Number	3rd Quarter	440,300	-0.1	-0.9
Visitor industry					
Total visitors (p)	Number	Jan.-Oct.	3,644,723	-	2.4
Westbound	Number	Jan.-Oct.	2,852,471	-	3.7
Eastbound	Number	Jan.-Oct.	792,252	-	-1.8
Visitor expenditures (p)	$ Million	1982	3,700	-	15.6
Hotel units	Number	February	58,765	-	1.4
Defense expenditures	$ Million	1982	1,693	-	16.8
Sugar production	$ Million	1982	351.5	-	7.2
Pineapple sales	$ Million	1982	206.0	-	-5.3

p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ 1983 data unless indicated otherwise.
3/ Seasonally adjusted annual rate.
4/ From August.
5/ From November.

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HAWAII

ECONOMIC RESEARCH REPORTS

RESEARCH AND ECONOMIC ANALYSIS DIVISION

DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

Second Quarter 1984

QUARTERLY STATISTICAL AND ECONOMIC REPORT - STATE OF HAWAII

Second Quarter 1984

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore and Karen Yamashita.

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1. The Economy -- Recent Trends

Hawaii's economy showed further signs of recovery during the first quarter of 1984, and for the first time in more than a year the State's visitor industry appeared to be in the forefront of economic activity.

Nationally, the economy appeared to be slowing somewhat from an unexpectedly rapid rate of growth in the first quarter, and interest rates were on the rise.

The Hawaii Economy

Judging by such information as January visitor arrival data, hotel occupancy for January-February, and industry reports, Hawaii has experienced a surge in tourism since the beginning of the year. The January total for all visitor arrivals was 16.7 percent greater than January of 1983. Furthermore, it was the previously declining eastbound market (arrivals from the Pacific and Orient areas) that experienced the largest increase -- up 26.3 percent from January 1983. The westbound market (arrivals from the U.S. Mainland and Canada) increased 13.9 percent in number of arrivals from January 1983.

January's westbound visitor statistics for the Neighbor Islands were mixed. Kauai showed a substantial 29.3 percent increase from January of 1983 while Maui's total increased 14.4 percent. On the other hand, the statistics indicate that Hawaii County experienced only a slight, 0.4 percent, increase in westbound tourism for January. The Hawaii County figure for arrivals is, however, somewhat inconsistent with the January hotel occupancy survey results for the Big Island that showed a 23 percent gain over January of 1983. The inconsistency between the arrival and occupancy statistics for the Big Island in January could be explained by a surge in eastbound visitors for whom no county-level data are available. In February, the Hawaii County occupancy rate surged to 72.3 percent, the highest monthly occupancy since March 1979 and 32 percent greater than in February of 1983. In addition, there are indications that the recent eruptions of Mauna Loa and Kilauea may have boosted the Big Island's visitor count even higher for March and April.

For the State as a whole, occupancy rates were up about 10 percentage points during the January-February period of this year compared to the same period a year before.

The overall level of business transactions in the State showed a healthy increase in early 1984. Sales of goods and services subject to State excise tax rose sharply in January although part of that increase may have been unreported carry-over sales from previous months. All industries in the State's economy with the exception of sugar processing recorded significant gains in taxable sales attributable to January activity.

Tax revenues to the State's general fund also accelerated during early 1984. During the first two months of 1984, total general fund tax revenue was 11.5 percent greater than in the same two months of 1983. Corporate income tax payments showed the sharpest gain during the two-month period, up 71.2 percent. Net individual income tax collections rose a healthy 14.9 percent, while general excise and use tax collections were up 11.2 percent in the first two months of the year.

There was a notable increase in private building construction authorizations during the first two months of 1984. Total authorizations in this category showed a 67 percent increase from the same 1983 period. Government construction authorizations were, however, down about 33 percent in January and February and there is still no trend towards improvement apparent for construction employment.

Personal income in the fourth quarter of 1984 increased 7.1 percent over the same period a year earlier. While official annual data are not yet available for personal income growth for 1983 as a whole, the quarterly data indicate about a 6.8 percent growth over 1982. This growth coupled with a 2.2 percent increase in consumer prices indicates a real 4.5 percent gain in the purchasing power of personal income for last year.

The Honolulu Consumer Price Index (CPI-U) continued to show only modest increase in the first quarter of 1984. The February Index was 3.8 percent higher than in the same month of 1983.

The U.S. Economy

The Nation's Gross National Product (GNP) advanced at a 8.4 percent annual rate of increase during the first quarter of 1984. This was a much faster rate than had been anticipated and was greeted with mixed feelings. Most economists are pleased by the strength the economy is showing in the face of high interest rates. But many are worried that continued robust economic growth will put increasing pressure on interest rates, driving them high enough to choke off the recovery and actually bring about another recession.

Excess growth of the economy poses several problems and potential pitfalls. First, if demand in the economy moves forward faster than goods and services can be produced, a general rise in prices will likely result. This in itself would be troublesome, but even more serious is that the Federal Reserve is committed to fighting inflation, should it begin accelerating, by restricting the growth of money and credit. Such action would, in turn, force interest rates well above current levels.

Another potential problem is that rapid growth encourages accelerated investment in new plant and equipment in order to expand production capacity. But with the Federal government drawing between $150 and $200 billion out of the financial markets this year to cover deficits, competition among business and government for the nation's savings could force interest rates up even without tightening action by the Federal Reserve.

In either case, a significant rise in interest rates would threaten the recovery in housing, autos, consumer durables and business capital investment, due to their sensitivity to interest rates.

Interest rates have, in fact, been edging up since early January. The Federal funds rate (the highly sensitive short-term rate that banks charge each other for loans) rose from about 8 1/2 percent in early January to over 10 percent in April. The recent increases in the prime and Federal Reserve discount rates are simply a belated reflection of the upward movement in short-term rates since the beginning of the year. Long-term interest rates have also edged up about one full percentage point from mid-January to mid-April. Whether the current rise in rates really represents a collision between Federal government and private sector credit demands for limited funds is not clear. Nor is it clear whether it is the demand for loans that is putting upward pressure on rates in general or a tightening of the supply of credit by the Federal Reserve.

An important question is how the economy will react to increasing interest rates. If moderately higher interest rates slow the recent high rate of economic growth to a more moderate level (about a 3 percent annual rate of increase), interest rates could stabilize and perhaps ease later on in the year. Such a result would increase optimism that the current recovery of the U.S. economy will continue into 1985 without an upsurge in inflation. If, on the other hand, the economy steams ahead at its recent pace in spite of the increase in interest rates, even higher rates could be expected later on, possibly resulting in a more drastic fall off in economic activity than is desirable. The latest data on unemployment, retail sales and industrial production suggest that the economy is, in fact, slowing from the rapid first quarter pace of growth, although the magnitude of the slowdown is not yet known.

2. Economic Outlook for Hawaii and the Nation

Most national economic forecasters expect the growth rate of the U.S. economy to ease in the second quarter of this year. The UCLA econometric forecast expects this easing in the growth rate to be mainly the result of a slowing in the growth of both residential construction and business inventories.

Those economists who consider the growth in the money supply as a key determinant of economic activity are also expecting a slowdown in the first half of 1984 based on a noticeable slowing in the growth of the money supply (M1) from a 9.5 percent annual rate of increase in the third quarter of the year down to a 4.8 percent growth rate in the fourth quarter.

Inflation is still expected to rise gradually to about the 5 percent level this year. Interest rates are generally expected to remain at or slightly above current levels as long as the pace of economic activity moderates. However, even this seemingly conservative interest rate outlook is rather speculative given the multitude of forces currently acting on the financial markets.

For Hawaii, the major question is whether the upsurge in tourism experienced in January will continue. Analysis of first quarter visitor arrival statistics, when they become available, may shed some light on this question. However, even without the data there is reason for optimism. First, Hawaii's most important visitor market, California, which is home for roughly 30 percent of Hawaii's westbound visitors, is experiencing an economic upswing. Employment in that State is expected to grow almost 6 percent in 1984, and personal income is forecast to increase by almost 14 percent this year. Coupled with the nationwide recovery, the California forecast suggests the potential for a strong U.S. market for Hawaii vacations. The only negative factor is the potential diversion of visitors from Hawaii to the summer Olympics in Los Angeles during the first half of August.

The market for foreign tourism to Hawaii is less robust than the domestic outlook due to the continued high value of the dollar on the world market and lingering effects of recession. However, a significant volume of eastbound visitor traffic to the summer Olympics could have positive spillover effects for Hawaii.

Defense expenditures in Hawaii during 1983 increased at roughly half the rate experienced in 1982. That slower growth trend may continue in 1984, especially if smaller increases for military spending become part of a possible deficit reduction plan under consideration by Congress this year.

The slightly positive 0.6 percent increases in the statewide job count for January and February of this year are encouraging and the outlook is favorable for continued improvement in the growth of jobs as long as the visitor industry continues its rebound.

A revised DPED econometric forecast for 1984 and 1985 will be presented in the next issue of the Quarterly Statistical and Economic Report.

3. Income and Prices

Total personal income in Hawaii during the fourth quarter of 1983 was 7.1 percent greater than in the same period of 1982. The increase in personal income for 1983 as a whole will probably show about a 6.8 percent increase from 1982 when official annual figures become available.

Consumer prices in Honolulu (CPI-U) slowed to a 2.2 percent increase between 1982 and 1983, the lowest increase since 1965. The February 1984 increase in the CPI-U edged up to a 3.8 percent increase from the same month in 1983.

Figure 3-1

Figure 3-2

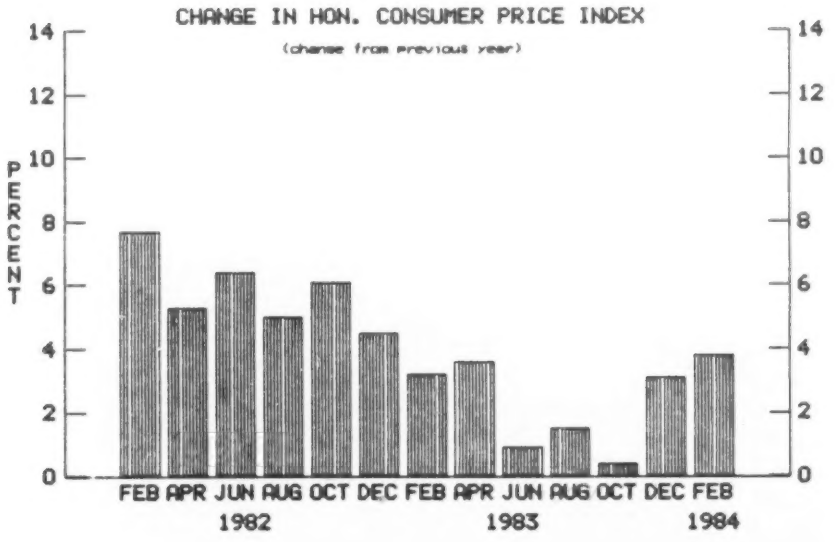


Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII QUARTERLY: 1980 TO 1983

[In millions of dollars]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980 1st Q ..	2,085,730	9,631	11.8	15.3
2nd Q ..	2,112,018	9,692	10.6	13.1
3rd Q ..	2,179,468	9,977	10.4	12.6
4th Q ..	2,257,524	10,301	11.4	13.2
1981 1st Q ..	2,330,567	10,485	11.7	8.9
2nd Q ..	2,386,236	10,670	13.0	10.1
3rd Q ..	2,482,747	10,981	13.9	10.1
4th Q ..	2,508,053	11,210	11.1	8.8
1982 1st Q ..	2,520,173	11,296	8.1	7.7
2nd Q ..	2,556,081	11,516	7.1	7.9
3rd Q ..	2,584,625	11,731	4.1	6.8
4th Q ..	2,625,190	11,814	4.7	5.4
1983 1st Q ..	2,647,192	12,179	5.0	7.8
2nd Q ..	2,703,256	12,320	5.8	7.0
3rd Q ..	2,752,504	12,378	6.5	5.5
4th Q ..	2,824,210	12,651	7.6	7.1

1/ Seasonally adjusted, annual rates.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, April 1984 and updates.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE THE UNITED STATES AND HAWAII ANNUALLY: 1970 TO 1982

[In millions of dollars]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970 ..	803,922	3,566	689,190	2,974
1975 ..	1,258,643	5,785	1,090,778	5,000
1980 ..	2,165,315	9,900	1,822,850	8,404
1981 ..	2,434,988	10,836	2,040,564	9,184
1982 ..	2,578,622	11,579	2,170,556	9,936
	Percent change from previous year			
1980 ..	11.0	13.5	10.9	13.5
1981 ..	12 5	9.3	11.9	9.3
1982 ..	5.9	6.6	6.4	8.2

1/ These represent the latest official annual data and may not be completely consistent with more recently published quarterly data.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, August 1983.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS, FOR HONOLULU: 1980 TO 1984

[1967=100]

Month and year	All items	Food	Housing	Apparel and upkeep	Trans-portation	Medical care
1980	228.5	259.9	216.6	183.9	223.6	258.6
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1983 1/	273.5	306.7	257.5	207.7	253.7	357.6
1981						
February	243.3	280.3	229.8	190.8	239.9	272.0
April	250.0	284.8	238.9	190.5	244.7	280.6
June	252.8	286.2	242.0	190.2	247.7	286.9
August	256.6	288.4	245.6	193.7	250.9	297.6
October	259.3	290.6	246.7	199.7	252.1	303.7
December	258.3	289.4	244.1	198.2	253.9	305.8
1982						
February	262.0	296.7	248.0	199.4	253.2	307.0
April	263.3	296.5	249.1	201.0	252.0	320.7
June	269.0	298.9	258.3	202.7	254.7	323.3
August	269.4	299.7	256.8	200.8	258.9	327.7
October	275.2	301.2	265.9	202.9	258.9	336.1
December	269.9	303.0	254.6	203.4	256.3	339.5
1983 1/						
February	270.4	304.8	255.0	205.5	251.0	349.0
April	272.8	307.1	257.8	208.7	249.4	355.4
June	271.4	306.1	254.5	205.5	250.0	355.9
August	273.5	307.7	255.5	209.1	254.3	365.5
October	276.4	308.4	260.2	210.0	258.2	362.7
December	278.4	307.1	264.7	208.8	260.1	363.0
1984						
February	280.7	312.7	264.7	211.0	261.5	372.2
Percent increase:						
1980 to 1981 .	10.5	10.0	10.9	5.2	10.5	11.9
1981 to 1982 .	6.0	4.5	6.1	4.2	3.4	12.1
1982 to 1983 .	2.2	2.6	1.0	3.1	-0.7	10.3
Feb. 1983 to Feb. 1984 ..	3.8	2.6	3.8	2.7	4.2	6.6

1/ Change in calculation--housing costs measured in rental equivalence (what owners would have to pay if they rented their homes).

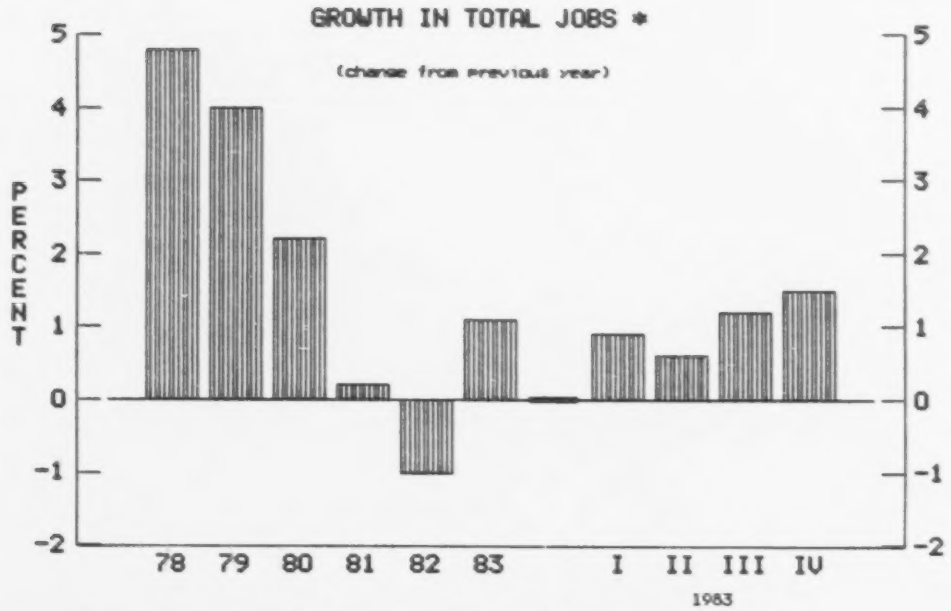
Source: U.S. Department of Labor, Bureau of Labor Statistics.

4. Employment

Revised job count data for 1983 indicate that the average number of jobs in the State grew an encouraging 1.1 percent from 1982 to 1983. Previously, the preliminary data had indicated a decline in the job count in each quarter of 1983.

Preliminary January and February 1984 data indicated an overall 0.6 percent increase in the total number of jobs statewide from the same months in 1983.

Figure 4-1



*Total of Non.Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non.Ag. Self Employed Persons and Labor Disputes.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1984

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,200	428,550	404,100	24,450	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	440,450	425,100	399,400	25,750	15,250	11,300	3,950	100
1983	445,100	429,900	403,050	26,800	15,100	11,200	3,900	150
1983								
1st Q ...	443,300	429,700	403,550	26,150	13,600	9,900	3,650	0
2nd Q ...	445,250	430,250	403,450	26,800	14,850	11,300	3,600	150
3rd Q ...	445,550	428,950	401,450	27,500	16,250	12,300	3,950	350
4th Q ...	446,350	430,600	403,800	26,800	15,700	11,200	4,500	50
1984 (p)								
Jan-Feb .	443,550	430,150	403,850	26,300	13,200	9,500	3,700	200
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.4	-1.6	-1.6	5.6	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.4	-3.1	-90.0
1982	-1.0	-0.9	-1.3	6.0	-4.1	-2.5	-9.2	100.0
1983	1.1	1.1	0.9	4.1	-1.0	-0.9	-1.3	50.0
1983								
1st Q ...	0.9	1.0	0.7	6.1	-2.2	0.5	-9.9	0.0
2nd Q ...	0.6	0.7	0.5	3.3	1.7	-0.9	-2.7	200.0
3rd Q ...	1.2	1.2	1.0	3.8	-0.6	-1.6	2.6	600.0
4th Q ...	1.5	1.6	1.4	3.7	0.0	-1.3	3.4	-66.7
1984 (p)								
Jan-Feb .	0.6	1.6	1.6	2.8	-2.2	-4.2	2.8	-

p Preliminary.

Note: Data rounded to nearest 50 and detail may not add to totals due to rounding.

1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.

Source: Hawaii State Departments of Labor and Industrial Relations, and Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1983 AND 1984

Series	1983	Jan.-Feb. 1984 (p)	Percent change from previous year: 1983	Percent change from previous year: Jan.-Feb. 1984 (p)
Total jobs 1/	445,100	443,550	0.6	0.6
Non-agricultural	403,050	403,850	0.9	0.4
Construction	17,950	17,450	-0.4	-3.6
Manufacturing	22,200	21,850	-1.1	-0.8
Food processing	11,150	10,850	-0.7	0.2
Transp., commun., utilities ...	30,700	30,700	-3.1	-0.3
Trade	105,750	106,900	-0.1	1.7
Wholesale	18,150	18,000	-3.9	-1.2
Retail	87,600	88,900	0.7	2.3
Finance, insur., & real estate	31,600	31,150	-0.3	-1.3
Services	103,800	105,100	2.7	1.4
Hotels	26,800	27,550	1.2	4.2
Government	91,050	90,750	0.8	-0.2
Federal	32,100	31,650	1.9	-1.1
State	45,650	46,550	0.0	0.3
Local	13,300	12,500	1.0	0.8
Agriculture (wage & salary)	11,200	9,500	-0.9	-4.5
Sugar	4,500	4,050	-4.0	-8.0
Pineapple	2,300	1,750	-6.3	-7.9
Diversified agriculture	4,400	3,650	5.9	1.4
Non-agricultural self-employed 2/	26,800	26,300	3.5	1.6
Agricultural self-employed 2/ ...	3,900	3,700	-1.4	1.4
Labor disputes	150	200	72.2	-100.0

p Preliminary.

1/ Total of non-agricultural and agricultural wage and salary, self-employed and jobs involved in labor disputes.

2/ Self-employed includes unpaid family workers and domestics.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1984

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	399,400	325,700	28,700	15,100	29,850
1983	403,050	327,950	29,150	15,500	30,450
1983					
1st Q	403,550	328,150	29,250	15,400	30,800
2nd Q	403,450	328,200	29,150	15,550	30,500
3rd Q	401,450	326,300	29,000	15,750	30,400
4th Q	403,800	329,200	29,200	15,300	30,050
1984 (p)					
Jan-Feb ...	403,850	329,100	29,150	15,350	30,200
	Percent change from same period in previous year				
1980	2.5	2.2	2.9	6.1	4.0
1981	-0.2	-0.2	1.4	0.6	3.5
1982	-1.3	-2.0	-0.4	-0.7	4.9
1983	0.9	0.7	1.6	2.6	2.0
1983					
1st Q	0.7	0.4	0.7	1.0	3.5
2nd Q	0.5	0.2	2.1	3.0	1.2
3rd Q	1.0	1.8	1.2	3.3	1.3
4th Q	1.4	1.3	2.3	2.7	1.5
1984 (p)					
Jan-Feb ...	0.4	0.7	0.0	0.0	-1.6

p Preliminary.

Note: Data are rounded to nearest 50 and detail may not add to total due to rounding.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1984

[Number of persons]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force:					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	339,550	41,800	20,000	36,650
1981	450,000	345,950	44,300	20,650	39,150
1982	460,000	352,050	45,450	21,300	42,200
1983	473,000	360,050	46,650	22,000	43,300
1983					
1st Q	469,550	358,150	46,100	21,850	43,450
2nd Q	474,550	361,350	47,050	22,200	44,000
3rd Q	472,850	359,900	46,950	22,500	43,500
4th Q	471,050	360,750	46,450	21,500	42,350
1984					
Jan-Feb	471,350	360,450	46,050	21,900	42,950
Civilian employment:					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	323,950	39,200	19,050	34,750
1981	426,000	328,850	40,850	19,450	36,800
1982	430,000	330,550	41,050	19,550	38,850
1983	442,000	339,450	42,400	20,300	39,850
1983					
1st Q	438,750	337,250	41,650	20,100	39,800
2nd Q	443,850	340,500	42,250	20,500	40,550
3rd Q	443,250	339,500	42,700	20,850	40,200
4th Q	442,150	340,450	42,900	19,850	39,000
1984					
Jan-Feb	444,700	342,650	42,050	20,150	39,850

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1984

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons):					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,600	950	1,900
1981	24,000	17,050	3,400	1,200	2,300
1982	31,000	21,500	4,450	1,700	3,350
1983	30,000	20,600	4,250	1,700	3,450
1983					
1st Q	30,800	20,900	4,450	1,750	3,650
2nd Q	30,750	20,850	4,750	1,650	3,450
3rd Q	29,600	20,400	4,250	1,650	3,300
4th Q	28,850	20,300	3,600	1,650	3,350
1984					
Jan-Feb	26,650	17,800	4,000	1,700	3,100
Unemployment rate (percent):					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.2	4.6	5.2
1981	5.4	4.9	7.7	5.9	5.9
1982	6.7	6.1	9.9	8.7	7.9
1983	6.5	5.5	9.1	8.4	7.7
1983					
1st Q	6.6	5.8	9.7	8.1	8.4
2nd Q	6.5	5.7	10.1	7.6	7.9
3rd Q	6.3	5.7	9.0	7.3	7.6
4th Q	6.1	5.6	7.7	7.6	8.0
1984					
Jan-Feb	5.6	4.9	8.7	7.9	7.1

Source: Hawaii State Department of Labor and Industrial Relations.

5. Business Activity and Tax Revenues

Total transactions in the State subject to excise and use tax showed a sharp 30.2 percent increase in January over the same period in 1983, although the data may be reflecting late reporting of sales in prior months. The growth in transactions during the last three months of 1983 was only 0.4 percent suggesting that some of the sharp increase in the January 1984 statistics actually belonged with the fourth quarter results. Transactions for February are likely to show a reduced growth rate for technical reasons.

January and February general fund tax revenues grew a healthy 11.5 percent from the same two months in 1983. The growth was led by a 71 percent in net corporate income tax collections.

Figure 5-1

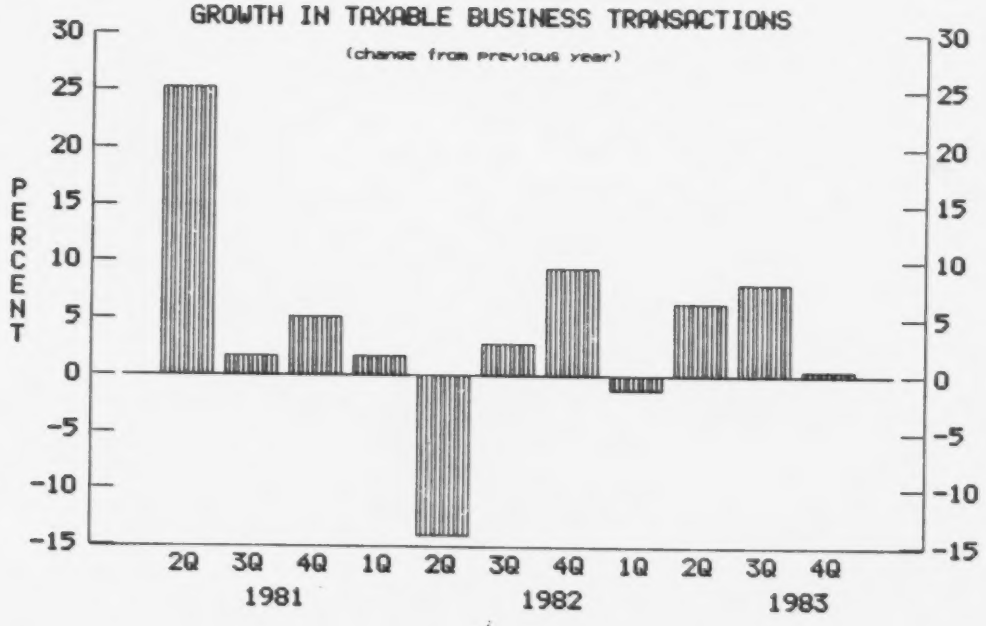


Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1984

[Millions of dollars]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manufacturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1983	21,416.8	7,458.8	2,128.5	858.2	221.6	502.3
1982						
1st Q	5,210.7	1,794.9	488.3	244.7	50.2	149.9
2nd Q	5,187.4	1,812.8	511.1	214.4	44.3	149.9
3rd Q	5,194.7	1,729.6	477.0	215.2	40.2	126.8
4th Q	5,129.3	1,706.3	499.7	201.2	42.2	117.6
1983						
1st Q	5,141.5	1,813.8	498.9	224.3	54.3	109.6
2nd Q	5,514.8	1,907.3	566.7	219.2	58.7	125.3
3rd Q	5,609.6	1,934.2	551.6	224.1	54.4	143.2
4th Q	5,150.9	1,803.5	511.2	190.6	54.2	124.2
1984 (Jan) ...	2,304.0	793.2	207.8	81.7	23.9	50.7
	Percent change from same period in previous year					
1982	-0.9	5.3	10.3	15.3	2.0	-11.6
1st Q	1.7	5.2	9.1	22.0	26.1	0.8
2nd Q	-14.1	2.3	1.9	-2.8	-19.6	-21.9
3rd Q	2.8	3.3	8.7	18.1	1.3	-17.0
4th Q	9.4	10.9	23.6	29.1	9.0	-4.1
1983	3.4	5.9	7.7	-2.0	25.3	-7.7
1st Q	-1.3	1.1	2.2	-8.3	8.2	-26.9
2nd Q	6.3	5.2	10.9	2.2	39.6	-5.2
3rd Q	8.0	11.8	15.6	4.1	35.3	12.9
4th Q	0.4	5.7	2.3	-5.3	28.5	5.6
1984 (Jan) ...	30.2	15.8	33.8	32.2	61.9	33.4

NA Not available.

Note: This series derived by lagging excise tax base data one month to adjust for reporting delay.

Source: Hawaii State Department of Planning and Economic Development based on raw data from Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1970 TO 1984

[Thousands of dollars]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State general fund 3/
1970	172,289	112,019	13,241	337,216
1975	301,475	178,922	37,310	585,701
1978	392,236	239,587	25,597	749,216
1979	466,535	287,163	37,771	890,434
1980	527,304	335,670	43,912	1,008,750
1981	575,216	349,643	43,594	1,070,895
1982	574,590	296,757	34,785	1,011,465
1983	615,536	358,072	27,960	1,109,876
1983 1st Q	155,780	94,313	6,456	267,914
2nd Q	159,436	54,183	9,343	270,680
3rd Q	151,498	107,922	11,330	295,506
4th Q	148,822	101,656	831	275,775
1984 Jan-Feb ..	113,274	82,932	7,825	206,829
	Percent change from corresponding period in previous year			
1978	11.4	12.9	11.2	11.5
1979	18.9	19.9	47.6	18.8
1980	13.0	16.9	16.3	13.3
1981	9.1	4.2	-0.7	6.1
1982	-0.1	-15.1	-20.2	-5.5
1983	7.1	20.7	-19.6	9.7
1983 1st Q	10.4	10.1	-38.6	7.9
2nd Q	8.1	331.2	-40.1	23.5
3rd Q	0.2	9.9	55.3	3.9
4th Q	10.4	1.3	-39.5	6.3
1984 Jan-Feb ..	11.2	14.9	71.2	11.5

Note: This series represents data as reported by the Department of Taxation, without adjustment.

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

6. The Visitor Industry

January 1984 visitor arrival statistics showed a sharp 16.7 percent overall increase over the same month a year earlier. The most surprising aspect of the January visitor increase was a 26.3 percent surge in eastbound visitors (from the Orient and Pacific areas). This market has been performing poorly for the last two years due to the worldwide recession and the high value of the U.S. dollar, both of which tend to discourage foreign tourism to the U.S. The westbound visitor count (encompassing arrivals from the U.S. Mainland and Canada) increased 13.9 percent in January.

The January statistics also indicated that all Islands except Hawaii experienced significant gains in westbound visitor arrivals with Kauai recording the highest increase at 29.3 percent. Hawaii County showed only a 0.4 percent gain in westbound visitors for the month. However, occupancy data for January showed the Big Island had a level of visitor room utilization that was 10 points higher in January 1984 than a year earlier. Kauai's overall occupancy rate increased only 5 percentage points. The presence of eastbound visitors (for which an Island by Island breakdown is unavailable) may account for the seemingly contradictory data.

Figure 6-1

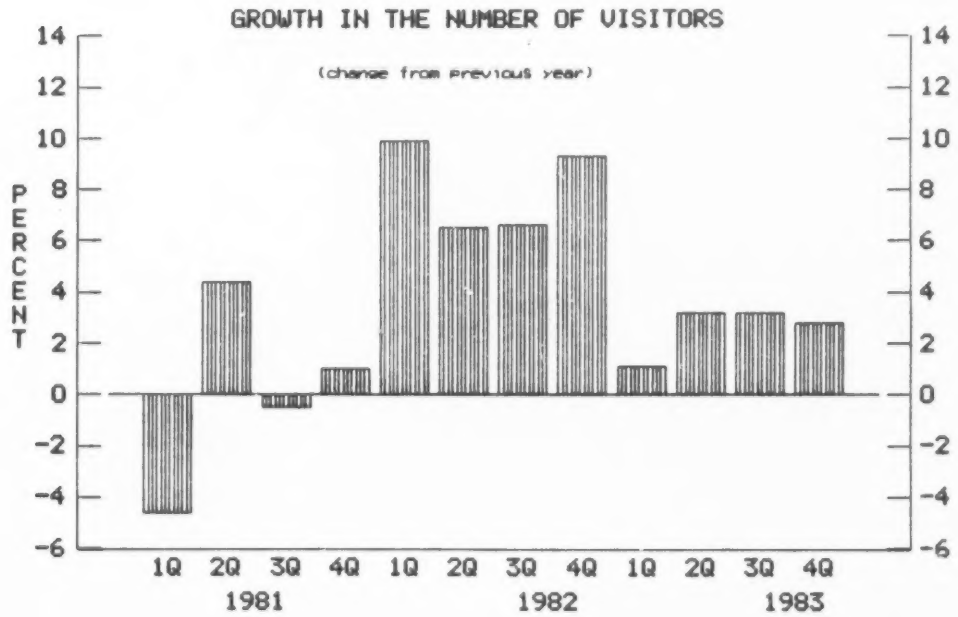


Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1970 TO 1984

Year	Visitors staying overnight or longer			Average number present	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1970	1,746,970	1,326,135	420,835	32,028	36,943
1975	2,829,105	2,207,417	621,688	59,495	66,308
1978	3,670,309	3,030,999	639,310	85,028	92,034
1979	3,960,531	3,139,455	821,076	89,678	98,676
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,576	96,095
1982	4,242,916	3,278,519	964,397	94,484	106,374
1983	4,357,184	3,404,434	952,750	(NA)	(NA)
1983 1st Q	1,069,945	845,441	224,504	(NA)	(NA)
2nd Q	1,082,474	838,537	243,937	(NA)	(NA)
3rd Q	1,146,170	903,447	242,723	(NA)	(NA)
4th Q	1,058,595	817,009	241,586	(NA)	(NA)
1984 Jan	379,683	287,320	92,363	(NA)	(NA)
	Percent change from corresponding period in previous year				
1978	6.9	9.7	-4.6	12.3	10.8
1979	7.9	3.6	28.4	5.5	7.2
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.4	10.7
1983	2.7	3.8	-1.2	-	-
1983 1st Q	1.4	1.9	-0.5	-	-
2nd Q	3.2	5.4	-3.5	-	-
3rd Q	3.2	4.4	-1.0	-	-
4th Q	2.8	3.5	0.5	-	-
1984 Jan.	16.7	13.9	26.3	-	-

NA Not available.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS BY COUNTY: 1981 TO 1984

Year 1/	City and County of Honolulu	Hawaii County	Maui County	Kauai County
1981	2,398,477	672,683	1,389,892	757,811
1982	2,702,655	703,901	1,608,222	760,549
1983	2,697,179	739,050	1,702,792	717,143
1983: 1st Q	660,635	198,116	426,926	154,800
2nd Q	680,651	169,517	411,261	177,914
3rd Q	728,618	188,904	453,364	207,183
4th Q	627,275	182,513	411,241	177,246
1984: Jan	218,188	61,982	143,909	56,892
	Percent change from corresponding period in previous year			
1981	(NA)	(NA)	(NA)	(NA)
1982	12.7	4.9	15.6	0.5
1983	-0.2	5.0	5.9	-5.7
1983: 1st Q	-1.7	10.5	2.4	-18.6
2nd Q	2.2	3.6	6.9	-10.1
3rd Q	0.2	5.3	11.3	-0.7
4th Q	-1.5	0.3	2.8	7.9
1984: Jan.	11.9	0.4	14.4	29.3

1/ Data prior to 1981 are not comparable to later figures due to revisions.

Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1984

[Percent, survey does not include some large hotel chains]

Date	State	Waikiki	Hawaii	Kauai	Maui
Annual average:					
1970	71.2	74.1	68.3	58.0	66.7
1975	74.1	78.3	59.9	77.2	72.3
1978	79.5	82.1	65.0	83.3	80.4
1979	73.8	77.1	62.0	76.5	73.0
1980	69.3	71.7	52.7	69.6	66.2
1981	68.2	73.9	44.9	62.7	70.3
1982	70.4	77.7	44.0	57.5	73.9
1983	69.7	76.6	44.7	57.2	75.2
1983					
January	63.4	70.3	41.8	43.8	65.7
February	80.8	90.3	55.0	63.3	88.7
March	79.9	87.9	49.7	57.6	88.1
April	65.3	71.2	40.8	47.8	72.9
May	63.3	69.6	36.9	55.0	69.8
June	74.6	81.6	43.7	66.1	79.1
July	73.3	81.9	45.1	64.0	73.5
August	75.3	80.2	49.9	66.8	83.1
September	66.1	71.9	40.7	62.5	68.7
October	65.7	70.9	51.0	61.1	77.3
November	64.9	69.4	45.3	51.8	73.0
December	66.1	74.5	38.8	45.9	64.2
1984					
January	74.9	84.2	51.3	48.8	77.1
February	89.3	(NA)	72.3	74.5	91.9

NA Not available.

Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company from 1981.

Table 6-4.-- EXISTING HOTEL UNITS, BY GEOGRAPHIC AREAS: 1970 TO 1983

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110

Source: Hawaii Visitors Bureau.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES, BY ISLANDS: 1970 TO 1984

[Dollars]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	(NA)	(NA)	(NA)	(NA)
1975	29.75	(NA)	(NA)	(NA)	(NA)
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
1983	54.78	46.93	48.84	81.60	59.78
1984 (Jan-Feb)	60.17	50.34	53.16	92.44	69.52
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983	5.6	4.6	3.4	8.8	2.2
1984 (Jan-Feb)	1.7	-0.9	-1.6	4.6	12.5

NA Not available.

Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

7. Construction

The value of construction activity (as measured by the base upon which excise tax on construction is paid) declined 1.6 percent in the fourth quarter of 1983 from the same period a year earlier. However, a sharp increase in the value of construction for January 1984 suggests that some fourth quarter construction activity may have been reported late for tax purposes and showed up in January figures.

Authorizations for future construction increased sharply for the private sector in the January-February period of 1984 but declined for public sector construction. The total of private permits was 66.5 percent ahead of January-February 1983. The growth in private sector permit values was led by a 139.9 percent increase in commercial and industrial authorizations for the period. Public contracts awarded declined an overall 33.0 percent and all three levels of government -- Federal, State, and Local -- showed declines.

January-February construction job data showed the average to be down 3.6 percent from the same 1983 period.

Figure 7-1

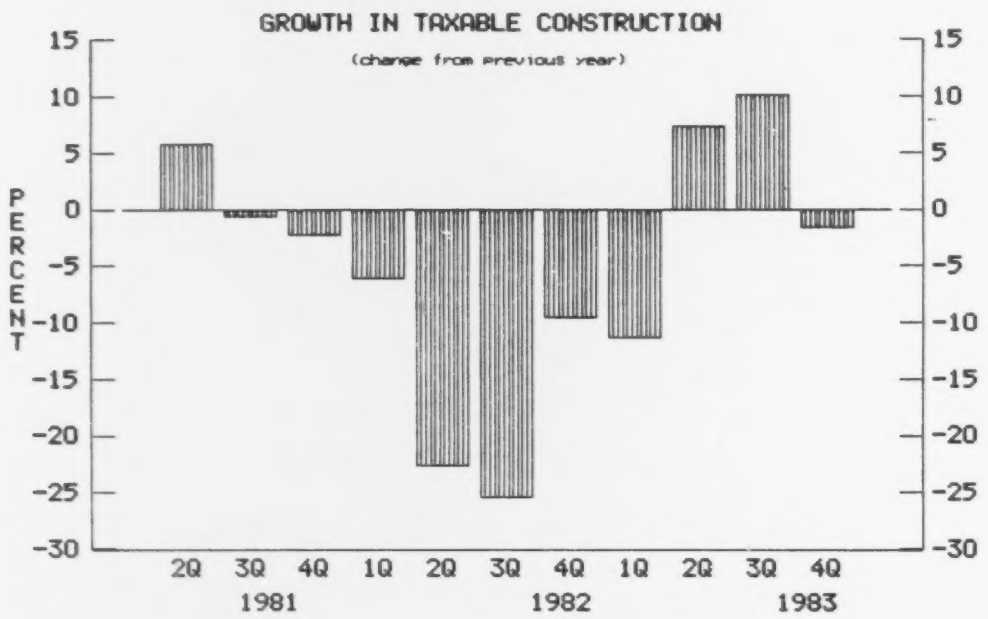


Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1984

[Millions of dollars]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1980	1,569.7	1,219.2	680.2	331.5	207.5	230.6
1981	1,584.7	802.0	398.3	240.8	162.9	427.5
1982	1,323.9	683.1	299.2	242.9	141.1	392.7
1983	1,334.2	685.2	296.2	203.2	185.9	277.9
1983 1st Q ...	318.5	117.3	57.4	18.5	41.4	98.4
2nd Q ...	359.4	156.9	66.9	33.8	56.3	23.7
3rd Q ...	342.3	211.4	117.9	41.7	45.8	71.6
4th Q ...	313.9	199.6	54.0	103.2	42.5	84.2
1984 Jan-Feb .	(NA)	106.3	52.5	25.6	28.2	65.9 3/
	Percent change from corresponding period in previous year					
1980	16.9	39.3	27.1	53.8	67.2	-40.7
1981	1.0	-34.2	-41.4	-27.4	-21.5	85.4
1982	-16.5	-14.8	-24.9	0.9	-13.4	-8.1
1983	0.8	0.3	-1.0	-16.3	31.8	-29.3
1983 1st Q ...	-11.3	25.7	43.5	-12.6	61.7	41.8
2nd Q ...	7.3	15.6	27.4	-12.0	25.4	-81.6
3rd Q ...	10.1	-23.8	6.4	-63.7	30.1	-31.4
4th Q ...	-1.6	13.0	-43.7	127.3	20.4	-9.0
1984 Jan-Feb .	-	66.5	69.4	139.9	27.3	-33.0 3/

NA Not available.

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

3/ Includes March data.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1984

[Millions of dollars]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1983	685.2	366.8	86.7	140.5	91.3
1983 1st Q ...	117.3	65.4	18.8	21.4	11.8
2nd Q ...	156.9	80.4	22.2	37.7	16.5
3rd Q ...	211.4	139.1	25.0	32.0	15.3
4th Q ...	199.6	81.9	20.7	49.3	47.7
1984 Jan-Feb .	106.3	65.2	18.9	9.3	12.8
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1983	0.3	-22.4	15.3	217.5	0.6
1983 1st Q ...	25.7	30.0	37.2	46.5	-19.7
2nd Q ...	15.6	4.8	-37.6	239.6	34.6
3rd Q ...	-23.8	-31.1	101.6	188.6	-70.7
4th Q ...	13.0	-43.2	54.2	555.7	319.0
1984 Jan-Feb .	66.5	75.5	138.2	20.3	83.3

Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED BY AWARDING AGENCY: 1970 TO 1984

[Millions of dollars]

Year	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1983	277.9	84.7	126.8	66.4
1983				
1st Q	98.4	11.7	53.7	33.1
2nd Q	23.7	5.7	8.4	9.6
3rd Q	71.6	16.9	37.0	17.7
4th Q	84.2	50.4	27.7	6.0
1984				
1st Q	65.9	8.7	38.9	18.3
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1983	-29.3	-39.3	-30.3	-6.7
1983				
1st Q	46.2	-44.8	93.9	80.7
2nd Q	-81.6	-92.3	-77.4	-26.7
3rd Q	-31.4	186.4	-54.4	1.7
4th Q	-9.1	47.8	-23.3	-73.3
1984				
1st Q	-33.0	-25.7	-27.4	-44.7

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED, BY COUNTY: 1970 TO 1984

[Includes duplexes]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1976	3,383	1,384	821	297	881
1977	4,891	2,281	1,074	445	1,091
1978	5,219	2,270	1,382	567	1,000
1979	6,181	3,156	1,445	556	1,024
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1983	3,417	1,627	938	291	561
1983 1st Q	896	471	242	57	126
2nd Q	952	502	212	73	165
3rd Q	862	396	240	80	146
4th Q	707	258	244	81	124
1984 Jan-Feb ...	788	470	153	50	115
	Percent change from corresponding period in previous year				
1978	6.7	0.5	28.7	27.4	-8.3
1979	18.4	39.0	4.6	-1.9	2.4
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1983	49.5	124.4	17.3	26.5	5.8
1983 1st Q	89.8	474.4	22.8	-8.1	-8.7
2nd Q	77.6	311.5	-0.5	15.9	19.6
3rd Q	37.7	82.5	29.0	31.1	-9.9
4th Q	8.6	-15.1	19.6	84.1	25.3
1984 Jan-Feb ...	43.0	53.6	13.3	78.6	40.2

Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED, BY COUNTY: 1970 TO 1984

[Three or more units per structure]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1976	3,751	3,397	129	4	221
1977	3,129	2,389	129	83	528
1978	4,236	1,968	334	610	1,324
1979	6,351	1,804	718	1,125	2,704
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1983	1,341	1,220	38	73	10
1983 1st Q	11	0	11	0	0
2nd Q	168	149	0	9	10
3rd Q	1,058	967	27	64	0
4th Q	104	104	0	0	0
1984 Jan-Feb ...	26	22	4	0	0
	Percent change from corresponding period in previous year				
1978	39.1	-1.8	158.9	(X)	150.8
1979	49.9	-8.3	115.0	84.4	104.2
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1983	-70.8	-70.3	-84.5	-38.1	-91.8
1983 1st Q	-96.5	-100.0	(X)	-100.0	100.0
2nd Q	-7.7	2,383.3	-100.0	(X)	(X)
3rd Q	-42.2	-45.6	-50.9	(X)	0
4th Q	-95.4	-95.4	-100.0	0	0
1984 Jan-Feb ...	(X)	(X)	(X)	(X)	(X)

X Not calculated -- data in base period equaled zero.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1983

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1976	21,400	36.2	19,350	5,650	22.6	8.80
1977	19,750	35.7	17,650	4,150	19.1	9.87
1978	20,650	36.6	18,900	2,500	11.7	10.53
1979	23,400	36.0	21,050	1,700	7.5	11.05
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	21,900	36.2	19,800	3,500	15.0	13.13
1982	17,850	35.8	16,000	4,000	20.0	14.50
1983	17,950	37.2	16,700	(NA)	(NA)	(NA)
1983 1st Q ..	18,100	38.6	17,450	2,850	14.0	15.53
2nd Q ..	17,850	37.6	17,250	(NA)	(NA)	15.64
3rd Q ..	17,900	38.0	17,000	(NA)	(NA)	15.81
4th Q ..	17,900	34.3	15,350	(NA)	(NA)	16.23
	Percent change from corresponding period in previous year					
1978	4.6	2.5	7.1	-39.8	(X)	6.7
1979	13.3	-1.6	11.4	-32.0	(X)	4.9
1980	2.4	0.6	3.1	55.9	(X)	7.2
1981	8.6	0.0	-7.1	32.1	(X)	11.2
1982	-18.5	-1.1	-19.2	14.3	(X)	9.4
1983	0.6	3.9	4.4	(NA)	(X)	(NA)
1983 1st Q ..	-4.5	11.9	6.7	-40.0	(X)	11.1
2nd Q ..	-1.4	5.6	7.1	(NA)	(X)	10.1
3rd Q ..	2.9	1.3	4.3	(NA)	(X)	10.9
4th Q ..	5.9	3.6	9.6	(NA)	(X)	(NA)

NA Not available.
X Not applicable.
1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.
2/ Equivalent number of jobs if all workers had worked a 40-hour week.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1984

[1967=100]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1979	266.2	248.3	288.8	264.3	237.6	287.5
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1983	331.5	276.5	400.9	352.1	294.6	402.0
1983						
March ..	324.0	267.7	395.0	348.7	292.4	397.4
June ...	336.6	288.9	396.8	351.5	297.1	398.6
Sept. ..	338.2	282.6	408.4	355.4	296.7	406.3
Dec. ...	339.8	282.7	411.9	359.0	297.0	413.0
1984						
March ..	348.0	283.0	430.0	367.4	296.0	429.3
	Percent change from corresponding period in previous year					
1979	9.4	13.5	5.2	9.5	16.1	5.3
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1983	8.8	10.3	7.5	6.6	4.7	7.8
1983						
March ..	7.6	7.0	8.0	6.8	3.9	8.7
June ...	11.6	16.0	7.9	7.7	6.3	8.6
Sept. ..	9.0	13.4	5.3	4.8	5.5	4.4
Dec. ...	7.9	11.3	5.5	4.8	3.8	5.4
1984						
March ..	7.4	5.7	8.9	5.4	1.2	8.0

1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

8. Major Sources of Income

Defense expenditure reports available for 1983 indicate about a 9.5 percent increase in defense spending in the State for that year over 1982. Defense expenditures in Hawaii during 1982 rose almost 17 percent from the 1981 level.

The value of processed sugar shipments to the Mainland for 1983 showed a 25.3 percent increase over 1982. Shipments of canned pineapple, however, declined 8.0 percent in 1983.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1983

[Millions of dollars]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1971	705	708.8	202.9	141.4
1972	840	744.2	184.7	145.4
1973	1,020	840.9	222.2	142.4
1974	1,225	897.9	676.6	127.1
1975	1,360	982.9	366.1	136.7
1976	1,640	1,034.2	257.0	144.5
1977	1,845	1,086.6	226.8	161.6
1978	2,146	1,155.5	285.2	162.9
1979	2,537	1,221.7	345.7	206.4
1980	2,875	1,317.4	594.1	226.5
1981	3,200	1,449.3	327.9	217.6
1982	3,700	1,693.4	351.5	206.0
1983	3,800 (p)	(NA)	(NA)	(NA)

p Preliminary.
NA Not available.
1/ Includes value of molasses.
Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaiian Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1983

[Millions of dollars]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1983	(NA)	935.9	702.7	(NA)	(NA)
1983					
1st Q	(NA)	230.7	187.3	43.8	(NA)
2nd Q	(NA)	237.7	163.1	45.5	(NA)
3rd Q	(NA)	229.9	178.2	47.9	(NA)
4th Q	(NA)	237.7	174.1	(NA)	(NA)
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1983	-	6.6	14.9	-	-
1983					
1st Q	-	7.6	31.3	6.6	-
2nd Q	-	13.8	7.9	2.2	-
3rd Q	-	2.8	5.5	10.6	-
4th Q	-	1.3	17.0	-	-

NA Not available.

Note: Data include all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1984

Year	Value of shipments 1/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 2/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1983	421.5	174.2	25.3	-8.0
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	43.1	47.4	49.1
1983				
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
3rd Q	136.2	50.9	35.4	-19.3
4th Q	79.4	50.3	-13.7	16.7

NA Not available.

Note: These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 8-1, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

1/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

2/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- RECENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period 2/	Number	Percent change	
				From preceding period	From same period in previous year
Resident population					
State	Persons	July 1, 1982	998,000	-	1.7
City and County of Honolulu	Persons	July 1, 1982	778,700	-	1.2
Hawaii County	Persons	July 1, 1982	100,200	-	3.4
Kauai County	Persons	July 1, 1982	42,000	-	3.2
Maui County 3/	Persons	July 1, 1982	77,000	-	3.9
Income					
Total personal income 4/	$ Million	4th Quarter	12,651	2.2	7.1
Consumer price index (Honolulu)					
All items	(1967=100)	February 1984	280.7	0.8 5/	3.8
Food prices	(1967=100)	February 1984	312.7	1.8 5/	2.6
Construction					
Total private permits	$ Million	4th Quarter	199.6	5.6	13.0
Total residential permits	$ Million	4th Quarter	54.0	-54.2	-43.7
New single-family units	Number	4th Quarter	707	-18.0	8.6
New multi-family units	Number	4th Quarter	104	-90.2	-95.4
Government contracts awarded	$ Million	1st Qtr. 1984	65.9	-21.7	-33.0
Construction cost indexes (Hon.)					
Single family	(1967=100)	March 1984	348.0	1.6	7.4
High-rise buildings	(1967=100)	March 1984	367.4	1.7	5.4
Employment (p)					
Total civilian labor force	Persons	4th Quarter	471,050	-0.4	1.4
Civilian employment	Persons	4th Quarter	442,150	-0.2	2.2
Civilian unemployment	Persons	4th Quarter	28,850	-2.5	-9.8
Unemployment rate	Percent	4th Quarter	6.1	-	-
Total jobs	Number	4th Quarter	446,350	0.2	1.5
Visitor industry					
Total visitors	Number	1983	4,357,184	-	2.7
Westbound	Number	1983	3,404,434	-	3.8
Eastbound	Number	1983	952,750	-	-1.2
Visitor expenditures (p)	$ Million	1983	3,800	-	2.7
Hotel units	Number	February	58,765	-	1.4
Defense expenditures	$ Million	1982	1,693	-	16.8
Sugar production	$ Million	1982	351.5	-	7.2
Pineapple sales	$ Million	1982	206.0	-	-5.3

p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ 1983 data unless indicated otherwise.
3/ Includes Kalawao County.
4/ Seasonally adjusted at annual rate.
5/ From December.

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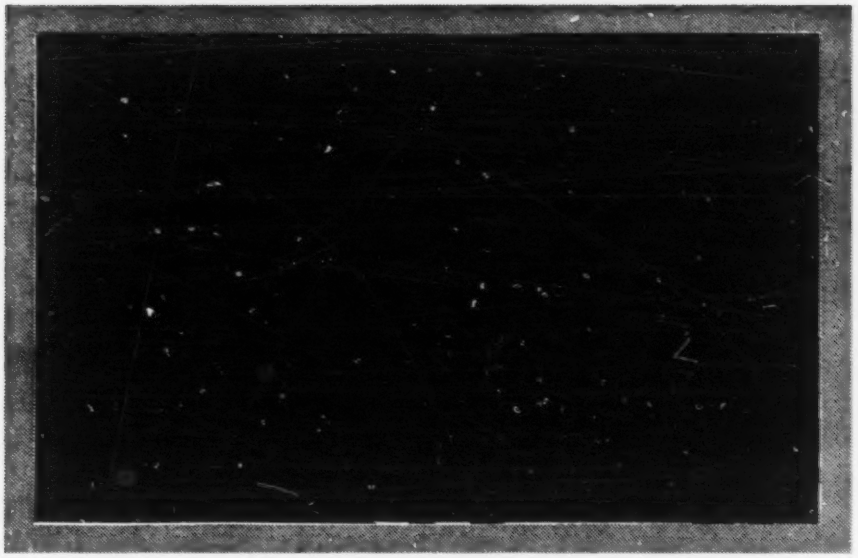

RESEARCH AND ECONOMIC ANALYSIS DIVISION

DEPARTMENT OF PLANNING AND ECONOMIC DEVELOPMENT

QUARTERLY STATISTICAL AND ECONOMIC REPORT
STATE OF HAWAII

Third Quarter 1984

QUARTERLY STATISTICAL AND ECONOMIC REPORT - STATE OF HAWAII

Third Quarter 1984

This quarterly report has been prepared by the Research and Economic Analysis Division of the Department of Planning and Economic Development (DPED). The purpose of the report is to present information and analysis concerning current statistical and economic trends affecting Hawaii. Technical notes and source descriptions have been kept to a minimum. However, the staff of the Research and Economic Analysis Division will be happy to respond to any inquiries of a technical nature that readers may have (548-3062).

The report was prepared under the direction of Dr. Richard Y. P. Joun, Head, Research and Economic Analysis Division, by Robert Shore, Karen Yamashita and Tu Duc Pham.

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1. The Economy -- Recent Trends

Led by a sharp increase in tourism, the performance in key areas of Hawaii's economy continued to exceed earlier expectations into the second half of 1984. Retailing, services, diversified agriculture, and diversified manufacturing have all showed encouraging gains in sales in the first four months of 1984 as measured by transactions subject to State excise tax. However, some sectors of the economy such as construction and sugar processing are still performing poorly and the overall gain in jobs for the first five months of 1984 was only 0.4 above the same 1983 period.

Nationally, the economy continued to show unexpected strength despite increasingly higher short- and long-term interest rates.

The Hawaii Economy

The State's visitor industry has been experiencing some exceptionally large monthly increases in visitor arrivals since January of this year. Through April, the total number of visitors to the State has increased more than 15 percent in 1984 over the first four months of 1983. In April the total increased almost 20 percent over April of 1983 -- the highest monthly increase from the previous year since November of 1978.

These percent increases may, however, be a bit deceiving as this year's visitor traffic is being compared to a decidedly disappointing visitor count for Hawaii during the first four months of 1983. During that period the number of visitors to the State was 0.6 percent below the same period the year before. The visitor count in April of 1983 was an especially disappointing 7 percent below the April 1982 level, thus, helping make this April's gain more impressive in a statistical sense. A truer test of the strength of this year's visitor market will occur when visitor data for this past June become available. June 1983 saw the number of visitors increase 10 percent over June of 1982. This imposes a high base number for comparing this past June's visitor count.

Regardless of its exact measure, though, the surge in visitor activity has boosted overall economic activity noticeably. The overall level of transactions in the economy, as measured by sales subject to State excise and use tax, showed an increase of over 14 percent in the first four months of 1984 over the same period a year earlier. An even more recent indicator of the impact that tourism has had is State General Fund tax collections for FY 1984, which showed almost a 9 percent increase over FY 1983. This is considerably above the 6 percent increase forecast by the State Council on Revenues a year ago for FY 1984 and even a good deal above the Council's 7 percent forecast made just a month before the end of the 1984 fiscal year. The additional tax revenue may allow some relaxation of the strict spending limits under which State agencies have been operating since early 1983.

Apart from tourism and those industries that benefit most from it, Hawaii's economy is turning in mixed results. Apparently, diversified agriculture and manufacturing sales have shown growth during the first four months of 1984, but construction continued to experience a decline in employment from the previous year while construction work itself about the same as in the first four months of last year in real terms. In addition, the number of jobs in manufacturing, finance/insurance/real estate, Federal government, and sugar and pineapple field work, all showed declines in the first five months of 1984 from the same 1983 period.

Defense expenditures declined about 2 percent during the first quarter of 1984 from the same 1983 quarter. Local purchases of goods and services by the military were bolstered in 1983 by repair work related to Hurricane Iwa which struck Kauai and Oahu in November 1982. With most of that work completed, 1984 local purchases may show little or no growth.

The U.S. Economy

The growth of Gross National Product (GNP) slowed somewhat in the second quarter of 1984 to a 7.5 percent annual rate, but not nearly as slow as most economists had expected and many would have preferred. First quarter GNP increased at a 10.1 percent annual rate. The nation's unemployment rate decline to 7.1 percent in June, its lowest level since 1981.

Many economists and business executives are concerned that if the economy does not slow soon the demand for goods and services will increase faster than production can supply them and result in either an acceleration of inflation or intolerably high interest rates if the Federal Reserve decides to curb credit. It had been hoped that the steady increase in short- and long-term interest rates since the beginning of the year would slow economic activity more than has been the case. A slight 0.1 percent decline in the U.S. Commerce Department's June index of leading indicators raised the prospect of slower growth in the future. However, the tiny one-month drop could be a statistical aberration rather than the beginning of a trend.

In Washington, D.C., the President signed into law the long-awaited deficit reduction or "down payment" plan. The package will raise an estimated $50 billion in taxes over the next three fiscal years while reducing estimated expenditures by $13 billion. The total three-year debt reduction of $63 billion will not greatly reduce future deficits but rather keep them in check. Projections vary, but it is hoped that the annual deficit will decline from about $185-$190 billions in FY 1984 to $175-$180 billion in FY 1987. Without the reduction plan the deficit would have reached an estimated $245 billion in FY 1987.

2. Economic Outlook for Hawaii and the Nation

Outlook for the Nation

The course of the U.S. economy continues to surprise forecasters. Both GNP and interest rates have increased sharper than most had predicted. The most recent national forecasts available do not reflect the upward revision in second quarter GNP from 5.7 to 7.5 percent, although they are revised upward from forecasts issued in the second quarter.

Table 2-1 represents an "average" of 46 reputable economic forecasts for the U.S., quarterly through 1985. After experiencing strong growth in GNP in the first and second quarters of 1984, the composite forecast concludes that growth will taper off over the next year and a half. Real GNP in the third quarter is expected to drop to a 3.7 percent annual rate. The rate will continue to moderate to a projected 2.2 percent increase in the last quarter of 1985. The composite forecast sees high interest rates continuing through 1985. For 1984 as a whole, the latest composite forecast expects real GNP to show a 6.5 percent increase over 1983.

Outlook for Hawaii

Based on the national outlook and current trends in Hawaii's economy, a forecast for Hawaii through 1986 is presented in table 2-2. The forecast assumes a somewhat conservative forecast for visitor arrivals -- 8 percent for 1984 and 4 percent in both 1985 and 1986. As indicated earlier, the sharp percentage increase in tourism for the first four months of 1984 is due in part to a depressed visitor industry in the comparable 1983 period. The true strength of this year's upswing in tourism will probably not be clear for several months. The visitor increases in the forecast for 1984 and 1985 represent the anticipated average rate of increase for tourism expected between 1985 and 1990. The 1984 and 1985 tourism projections will be revised for DPED's 1984 year-end forecast based on the industry's performance.

Among the other assumptions for forecasting purposes is that processed pineapple sales will remain steady in current dollar terms between 1984 and 1986 while processed sugar revenue will increase modestly in 1984 and 1985. Based on the forecast for the U.S. Consumer Price Index (CPI-U) the Honolulu CPI-U is expected to increase gradually to about 6.5 percent in 1986.

Such conditions should result in a moderate real increase in Hawaii's Gross State Product (GSP) of between 2.2 and 2.6 percent per year through 1986. The annual rate of increase in total jobs would be expected to increase from 1.9 percent in 1984 to 3.0 percent in 1986.

It must be stressed, of course, that the Hawaii forecast for 1985 and 1986 are subject to increasing margins of error depending on the course of the U.S. economy, the demand for vacation travel and, to a lesser extent, events in the sugar and pineapple markets. The forecast

does, however, provide a rough guide to what the future is likely to bring based on current trends.

Accuracy of the 1983 Forecast

With most 1983 data in, it is possible to evaluate the accuracy of the 1983 DPED forecast issued in December 1982. As table 2-3 indicates, the forecast was reasonably accurate in predicting most economic variables in 1983 with the exception of construction. In the case of construction, multi-family residential and commercial construction failed to respond as expected to the significant decline in interest rates between 1982 and 1983.

The visitor arrival projection for 1983 was over optimistic by about one percentage point, well within a reasonable range of the actual result. The forecast for FY 1984 State General Fund tax revenue also proved quite close to the actual result. The forecast would have been almost right on target had not the State been required to refund $10 million to the inter-island airlines due to a U.S. Supreme Court ruling unfavorable to the State's practice of taxing those airlines.

Finally, the forecasts for 1983 personal income and the Consumer Price Index (CPI) were almost exactly on target. With the exception of visitor arrival/expenditure projections and the CPI, the forecast is the product of DPED's short-run econometric model of the Hawaii economy.

Table 2-1.-- COMPOSITE FORECAST OF KEY U.S. ECONOMIC VARIABLES: 1984 TO 1986

Variable	1984		1985				1984	1985	1986
	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4			
Real GNP	3.7	3.1	2.8	2.8	2.5	2.2	6.5	3.0	1.7
GNP deflator	4.4	5.1	5.5	5.6	5.8	6.1	3.9	5.4	6.4
Consumer price index	4.8	5.4	5.7	5.9	6.1	6.4	4.6	5.7	6.5
3-month treasury bill rate	10.1	10.3	10.4	10.6	10.7	10.7	9.9	10.6	9.2
Aaa corporate bond rate ..	13.7	13.7	13.7	13.7	13.9	13.8	13.4	13.7	10.9

Source: Eggart Economic Enterprises, Blue Chip Economic Indicators, July 10, 1984 (for 1984 and 1985 forecast), April 10, 1984 (1986 forecast).

Table 2-2.-- FORECAST OF SELECTED ECONOMIC AND POPULATION VARIABLES FOR HAWAII: 1984 TO 1986

Variable	1984	1985	1986
Total population (thousands)	1,040.4	1,057.8	1,073.5
Annual percent change 1/	1.7	1.7	1.5
Gross state product (billions of current $)	14.8	16.6	17.5
Annual percent change	7.2	8.5	8.9
Gross state product (billions of constant 1980 $)	12.1	12.5	12.7
Annual percent change	2.2	2.6	2.2
Total personal income (billions of current $)	13.3	14.4	15.7
Annual percent change	7.2	8.6	8.7
*Honolulu consumer price index (CPI-U; annual average)	287.2	304.4	324.2
Annual percent change	5.0	6.0	6.5
Total jobs (thousands)	453.7	465.7	479.6
Annual percent change	1.9	2.6	3.0
*Total visitor arrivals (millions)	4.8	4.9	5.1
Annual percent change	8.0	4.0	4.0
*Processed sugar sales (millions $) 2/	429.0	455.0	455.0
Annual percent change	5.0	6.1	0.0
*Processed pineapple sales (millions $) 2/	190.0	190.0	190.0
Annual percent change	3.8	0.0	0.0

* Indicates an assumption upon which the Hawaii Econometric Model determined the other variables.

1/ Percent change from previous fiscal year.

2/ As measured by the unadjusted excise tax base for the variable.

Source: Department of Planning and Economic Development.

Table 2-3.-- FORECAST RESULTS FOR 1983: ACTUAL VS. PROJECTED

[Annual percentage growth rate]

Variable	Actual	Projected	Difference
Visitor arrivals	2.7	4.0	1.3
Real visitor expenditures	4.0	4.0	0.0
Personal income	6.8	6.9	0.1
Honolulu Consumer Price Index	4.0 1/	4.0	0.0
Total jobs	1.1	1.6	0.5
State General Fund Tax Revenues 2/ .	8.9	10.0	1.1
Total Real Construction	1.3	13.0	11.7

1/ Because changes in the measurements of housing components in the Consumer Price Index for all urban consumers in 1983, the Honolulu Consumer Price Index for clerical workers was used for comparison.

2/ Fiscal year 1984 (July 1, 1983 to June 30, 1984).

Source: Department of Planning and Economic Development Short-range Forecast, December 1982. All forecasted variables except tax revenue appeared in the Quarterly Statistical and Economic Report First Quarter 1983. Tax revenue forecast was contained in testimony before the State Senate's Ways and Means Committee in January 1983.

3. Income and Prices

Total personal income in Hawaii during the fourth quarter of 1983 was 7.1 percent greater than in the same period of 1982. The increase in personal income for 1983 as a whole will probably show about a 6.8 percent increase from 1982 when official annual figures become available.

Consumer prices for the first four months of 1984 were 3.6 percent above the comparable 1983 period. This rate is slightly below the expected rate for this year but above the 2.2 percent CPI-U increase experienced in 1983 as a whole.

Figure 3-1

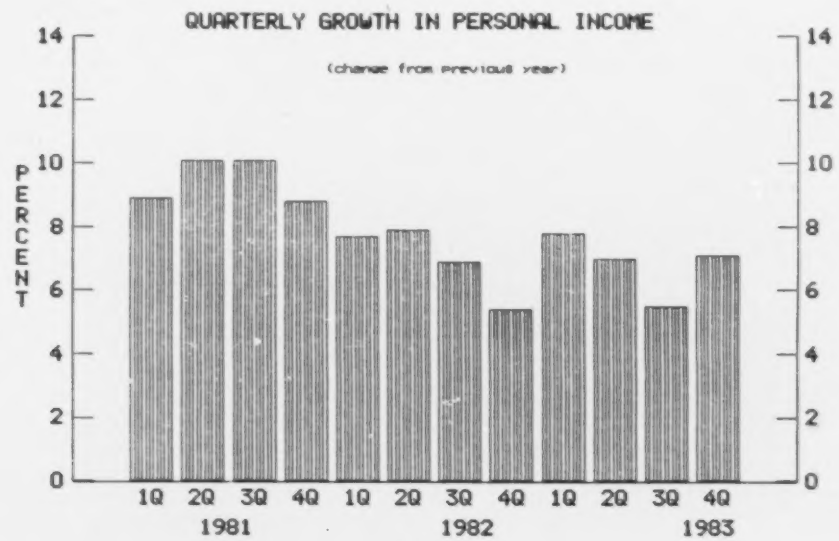


Figure 3-2

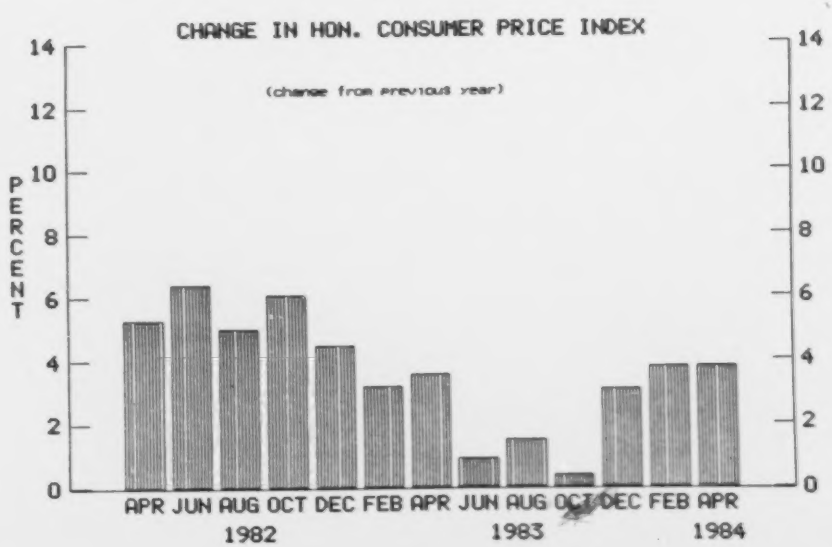


Table 3-1.-- TOTAL PERSONAL INCOME FOR THE UNITED STATES AND HAWAII QUARTERLY: 1980 TO 1983

[In millions of dollars]

Year/quarter	Total personal income 1/		Percent change from same quarter in previous year	
	United States	Hawaii	United States	Hawaii
1980 1st Q ..	2,085,730	9,631	11.8	15.3
2nd Q ..	2,112,018	9,692	10.6	13.1
3rd Q ..	2,179,468	9,977	10.4	12.6
4th Q ..	2,257,524	10,301	11.4	13.2
1981 1st Q ..	2,330,567	10,485	11.7	8.9
2nd Q ..	2,386,236	10,670	13.0	10.1
3rd Q ..	2,482,747	10,981	13.9	10.1
4th Q ..	2,508,053	11,210	11.1	8.8
1982 1st Q ..	2,520,173	11,296	8.1	7.7
2nd Q ..	2,556,081	11,516	7.1	7.9
3rd Q ..	2,584,625	11,731	4.1	6.8
4th Q ..	2,625,190	11,814	4.7	5.4
1983 1st Q ..	2,647,192	12,179	5.0	7.8
2nd Q ..	2,703,256	12,320	5.8	7.0
3rd Q ..	2,752,504	12,378	6.5	5.5
4th Q ..	2,824,210	12,651	7.6	7.1

1/ Seasonally adjusted, annual rates.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, April 1984 and updates.

Table 3-2.-- TOTAL PERSONAL AND DISPOSABLE INCOME FOR THE UNITED STATES AND HAWAII ANNUALLY: 1970 TO 1982

[In millions of dollars]

Year	Total personal income 1/		Disposable income	
	United States	Hawaii	United States	Hawaii
1970 ..	803,922	3,566	689,190	2,974
1975 ..	1,258,643	5,785	1,090,778	5,000
1980 ..	2,165,315	9,900	1,822,850	8,404
1981 ..	2,434,988	10,836	2,040,564	9,184
1982 ..	2,578,622	11,579	2,170,556	9,936
	Percent change from previous year			
1980 ..	11.0	13.5	10.9	13.5
1981 ..	12.5	9.3	11.9	9.3
1982 ..	5.9	6.6	6.4	8.2

1/ These represent the latest official annual data and may not be completely consistent with more recently published quarterly data.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, August 1983.

Table 3-3.-- CONSUMER PRICE INDEX, ALL URBAN CONSUMERS (CPI-U) FOR SELECTED ITEMS, FOR HONOLULU: 1980 TO 1984

[1967=100]

Month and year	All items	Food	Housing	Apparel and upkeep	Trans-portation	Medical care
1980	228.5	259.9	216.6	183.9	223.6	258.6
1981	252.4	285.8	240.3	193.4	247.1	289.4
1982	267.6	298.8	255.0	201.5	255.6	324.3
1983 1/	273.5	306.7	257.5	207.7	253.7	357.6
1982						
February	262.0	296.7	248.0	199.4	253.2	307.0
April	263.3	296.5	249.1	201.0	252.0	320.7
June	269.0	298.9	258.3	202.7	254.7	323.3
August	269.4	299.7	256.8	200.8	258.9	327.7
October	275.2	301.2	265.9	202.9	258.9	336.1
December	269.9	303.0	254.6	203.4	256.3	339.5
1983 1/						
February	270.4	304.8	255.0	205.5	251.0	349.0
April	272.8	307.1	257.8	208.7	249.4	355.4
June	271.4	306.1	254.5	205.5	250.0	355.9
August	273.5	307.7	255.5	209.1	254.3	365.5
October	276.4	308.4	260.2	210.0	258.2	362.7
December	278.4	307.1	264.7	208.8	260.1	363.0
1984						
February	280.7	312.7	264.7	211.0	261.5	372.2
April	283.2	315.6	267.8	208.5	262.9	378.3
Percent increase:						
1980 to 1981 .	10.5	10.0	10.9	5.2	10.5	11.9
1981 to 1982 .	6.0	4.5	6.1	4.2	3.4	12.1
1982 to 1983 .	2.2	2.6	1.0	3.1	-0.7	10.3
Apr. 1983 to Apr. 1984 ..	3.8	2.8	3.9	-0.1	5.4	6.4

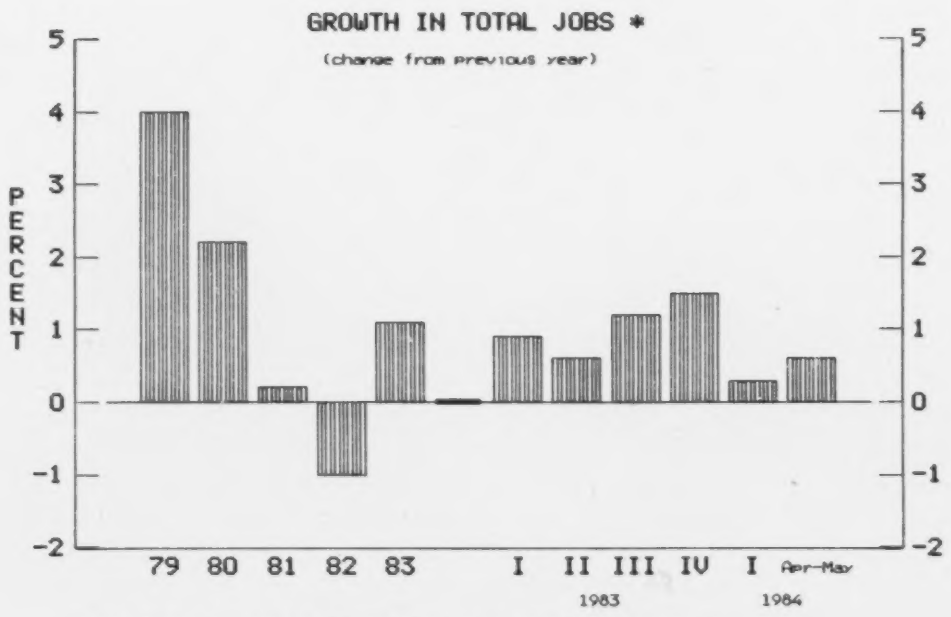
1/ Change in calculation--housing costs measured in rental equivalence (what owners would have to pay if they rented their homes).

Source: U.S. Department of Labor, Bureau of Labor Statistics.

4. Employment

Preliminary January through May 1984 data show an overall 0.4 percent increase in the total number of jobs statewide from the same months in 1983. This represents a moderation of the 1.1 percent rate of growth in jobs experienced during 1983. However, the estimates are subject to margins of error which could account for the apparent slow growth this year in the job data. The unemployment rate in Hawaii was to 5.5 percent in May of 1984 compared to 6.4 percent one year earlier.

Figure 4-1



*Total of Non.Ag. Wage & Salary Jobs, Ag. Wage & Salary Jobs, Ag. and Non.Ag. Self employed Persons and Labor Disputes.

Table 4-1.-- TOTAL JOBS IN HAWAII: 1975 TO 1984

Year	Total jobs 1/	Non-agriculture			Agriculture			Labor disputes
		Total	Wage & salary	Self-employed	Total	Wage & salary	Self-employed	
1975	380,900	364,900	342,800	22,050	15,800	11,050	4,800	200
1980	444,200	428,550	404,100	24,450	15,150	10,650	4,500	500
1981	445,050	429,100	404,800	24,300	15,900	11,550	4,350	50
1982	440,450	425,100	399,400	25,750	15,250	11,300	3,950	100
1983	445,100	429,900	403,050	26,800	15,100	11,200	3,900	150
1983								
1st Q ...	443,300	429,700	403,550	26,150	13,600	9,900	3,650	0
2nd Q ...	445,250	430,250	403,450	26,800	14,850	11,300	3,600	150
3rd Q ...	445,550	428,950	401,450	27,500	16,250	12,300	3,950	350
4th Q ...	446,350	430,600	403,800	26,800	15,700	11,200	4,500	50
1984 (p)								
1st Q ...	444,600	431,100	404,850	26,250	13,300	9,600	3,700	150
Apr-May .	446,250	432,300	405,750	26,550	13,900	10,400	3,500	0
	Percent change from the same period in previous year							
1980	2.2	2.4	2.6	0.4	-1.6	-1.6	5.6	-28.6
1981	0.2	-0.1	-0.2	-0.6	5.0	8.4	-3.1	-90.0
1982	-1.0	-0.9	-1.3	6.0	-4.1	-2.5	-9.2	100.0
1983	1.1	1.1	0.9	4.1	-1.0	-0.9	-1.3	50.0
1983								
1st Q ...	0.9	1.0	0.7	6.1	-2.2	0.5	-9.9	0.0
2nd Q ...	0.6	0.7	0.5	3.3	-1.7	-0.9	-2.7	200.0
3rd Q ...	1.2	1.2	1.0	3.8	-0.6	-1.6	2.6	600.0
4th Q ...	1.5	1.6	1.4	3.7	0.0	-1.3	3.4	-66.7
1984 (p)								
1st Q ...	0.3	0.3	0.3	0.5	-2.1	-3.4	1.4	(X)
Apr-May .	0.5	0.6	0.6	0.1	-2.5	-3.3	0.0	0.0

p Preliminary.
x Not calculated -- data in base period equaled zero.
Note: Data rounded to nearest 50 and detail may not add to totals due to rounding.
1/ Total of wage and salary jobs and self-employed in agricultural and non-agricultural industries plus those jobs involved in labor disputes.
Source: Hawaii State Departments of Labor and Industrial Relations, and Planning and Economic Development.

Table 4-2.-- NUMBER OF JOBS BY INDUSTRY: 1983 AND 1984

Series	1983	Jan.-May 1984 (p)	Percent change from previous year	
			1983	Jan.-May 1984 (p)
Total jobs 1/	445,100	445,400	1.1	0.4
Non-agricultural	403,050	405,250	0.9	0.4
Construction	17,950	17,200	-0.4	-4.3
Manufacturing	22,200	21,600	-1.1	-1.5
Food processing	11,150	10,550	-0.7	-2.5
Transp., commun., utilities ...	30,700	30,800	-3.1	0.1
Trade	105,750	107,300	-0.1	2.2
Wholesale	18,150	18,150	-3.9	-0.5
Retail	87,600	89,200	0.7	2.8
Finance, insur., & real estate	31,600	31,050	-0.3	-2.1
Services	103,800	105,450	2.7	1.5
Hotels	26,800	27,700	1.2	3.4
Government	91,050	91,850	0.8	-0.4
Federal	32,100	31,700	1.9	-1.4
State	45,650	47,650	0.0	0.1
Local	13,300	12,550	1.0	0.7
Agriculture (wage & salary)	11,200	9,900	-0.9	-3.3
Sugar	4,500	4,200	-4.0	-5.0
Pineapple	2,300	1,800	-6.3	-8.6
Diversified agriculture	4,400	3,900	5.9	1.3
Non-agricultural self-employed 2/	26,800	26,400	4.1	0.3
Agricultural self-employed 2/ ...	3,900	3,650	-1.3	0.6
Labor disputes	150	200	50.0	(X)

p Preliminary.
x Not calculated -- data in base period equaled zero.
1/ Total of non-agricultural and agricultural wage and salary, self-employed and jobs involved in labor disputes.
2/ Self-employed includes unpaid family workers and domestics.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-3.-- NON-AGRICULTURAL JOBS BY COUNTY: 1975 TO 1984

Year	State	City & County of Honolulu	Hawaii County	Kauai County	Maui County
1975	342,800	287,400	24,350	11,600	19,500
1980	404,100	333,050	28,450	15,150	27,500
1981	404,800	332,300	28,850	15,200	28,450
1982	399,400	325,700	28,700	15,100	29,850
1983	403,050	327,950	29,150	15,500	30,450
1983					
1st Q	403,550	328,150	29,250	15,400	30,800
2nd Q	403,450	328,200	29,150	15,550	30,500
3rd Q	401,450	326,300	29,000	15,750	30,400
4th Q	403,800	329,200	29,200	15,300	30,050
1984 (p)					
1st Q	404,850	330,050	29,200	15,300	30,250
Apr-May ...	405,800	331,200	29,050	15,200	30,400
	Percent change from same period in previous year				
1980	2.5	2.2	2.9	6.1	4.0
1981	-0.2	-0.2	1.4	0.6	3.5
1982	-1.3	-2.0	-0.4	-0.7	4.9
1983	0.9	0.7	1.6	2.6	2.0
1983					
1st Q	0.7	0.4	0.7	1.0	3.5
2nd Q	0.5	0.2	2.1	3.0	1.2
3rd Q	1.0	1.8	1.2	3.3	1.3
4th Q	1.4	1.3	2.3	2.7	1.5
1984 (p)					
1st Q	0.3	0.6	-0.1	-0.6	-1.7
Apr-May ...	0.6	1.0	-0.7	-2.3	0.0

p Preliminary.

Note: Data are rounded to nearest 50 and detail may not add to total due to rounding.

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-4.-- CIVILIAN LABOR FORCE AND EMPLOYMENT BY COUNTY: 1970 TO 1984

[Number of persons]

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian labor force:					
1970	321,550	258,900	28,300	13,650	20,700
1975	382,950	304,200	34,600	16,300	27,800
1980	438,000	339,550	41,800	20,000	36,650
1981	450,000	345,950	44,300	20,650	39,150
1982	460,000	352,050	45,450	21,300	42,200
1983	473,000	360,050	46,650	22,000	43,300
1983					
1st Q	469,550	358,150	46,100	21,850	43,450
2nd Q	474,550	361,350	47,050	22,200	44,000
3rd Q	472,850	359,900	46,950	22,500	43,500
4th Q	471,050	360,750	46,450	21,500	42,350
1984					
1st Q	472,300	361,400	46,100	21,800	42,950
Apr-May	476,550	365,200	46,400	21,800	43,200
Civilian employment:					
1970	305,650	246,400	27,050	12,950	19,250
1975	351,100	280,050	31,150	14,800	25,050
1980	417,000	323,950	39,200	19,050	34,750
1981	426,000	328,850	40,850	19,450	36,800
1982	430,000	330,550	41,050	19,550	38,850
1983	442,000	339,450	42,400	20,300	39,850
1983					
1st Q	438,750	337,250	41,650	20,100	39,800
2nd Q	443,850	340,500	42,250	20,500	40,550
3rd Q	443,250	339,500	42,700	20,850	40,200
4th Q	442,150	340,450	42,900	19,850	39,000
1984					
1st Q	446,000	343,800	42,150	20,150	39,900
Apr-May	450,550	347,500	42,450	20,250	40,400

Source: Hawaii State Department of Labor and Industrial Relations.

Table 4-5.-- CIVILIAN UNEMPLOYED AND UNEMPLOYMENT RATE BY COUNTY: 1970 TO 1984

Subject and year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
Civilian unemployed (persons):					
1970	15,900	12,500	1,250	700	1,450
1975	31,850	24,200	3,450	1,500	2,750
1980	21,000	15,600	2,600	950	1,900
1981	24,000	17,050	3,400	1,200	2,300
1982	31,000	21,500	4,450	1,700	3,350
1983	30,000	20,600	4,250	1,700	3,450
1983					
1st Q	30,800	20,900	4,450	1,750	3,650
2nd Q	30,750	20,850	4,750	1,650	3,450
3rd Q	29,600	20,400	4,250	1,650	3,300
4th Q	28,850	20,300	3,600	1,650	3,350
1984					
1st Q	26,300	17,600	3,950	1,650	3,100
Apr-May	26,050	17,700	3,950	1,550	2,800
Unemployment rate (percent):					
1970	4.9	4.8	4.4	5.2	7.0
1975	8.3	8.0	9.9	9.1	9.8
1980	4.9	4.6	6.2	4.6	5.2
1981	5.4	4.9	7.7	5.9	5.9
1982	6.7	6.1	9.9	8.7	7.9
1983	6.5	5.5	9.1	8.4	7.7
1983					
1st Q	6.6	5.8	9.7	8.1	8.4
2nd Q	6.5	5.7	10.1	7.6	7.9
3rd Q	6.3	5.7	9.0	7.3	7.6
4th Q	6.1	5.6	7.7	7.6	8.0
1984					
1st Q	5.5	4.9	8.5	6.9	7.1
Apr-May	5.5	4.9	8.6	7.1	6.5

Source: Hawaii State Department of Labor and Industrial Relations.

5. Business Activity and Tax Revenues

Total transactions in the State subject to excise and use tax increased 13.2 percent in the first quarter of 1984, over the same 1983 quarter. Total general fund tax revenues increased 9.5 percent in the first quarter and 13.2 percent in April and May of 1984 compared to the same periods in the previous year. For the FY 1984 State fiscal year, total general fund revenues increased 8.9 percent, about 2 percentage points above earlier official projections.

Figure 5-1

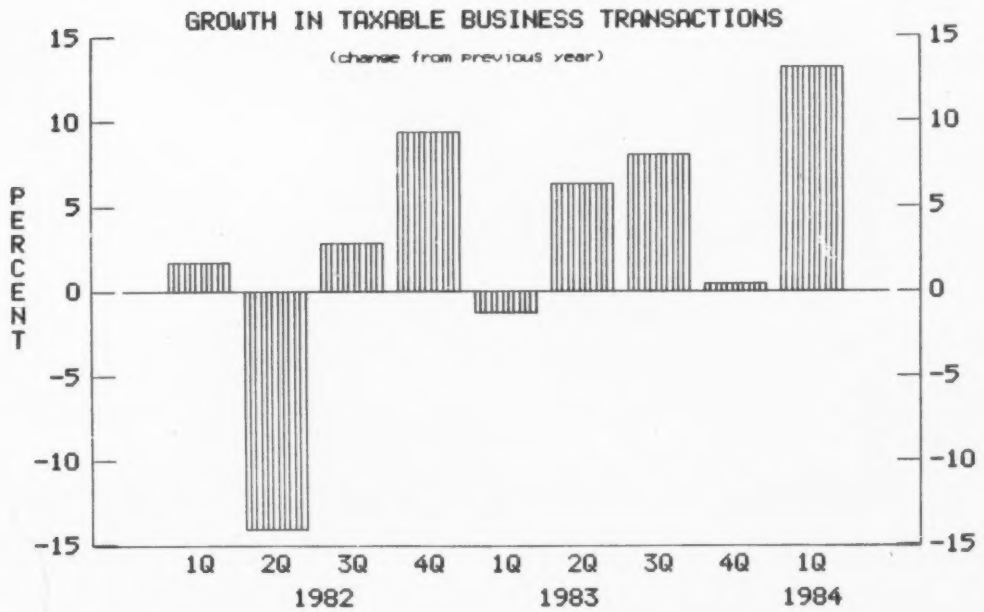


Table 5-1.-- VALUE OF BUSINESS TRANSACTIONS IN HAWAII SUBJECT TO STATE EXCISE AND USE TAX: 1980 TO 1984

[Millions of dollars]

Year	Total taxable transactions	Selected industry transactions				
		Retailing	Services	Hotel rental	Diversified agriculture	Manufacturing
1980	18,966.2	6,075.5	1,750.1	720.7	141.3	620.1
1981	20,903.8	6,690.7	1,792.1	759.4	173.3	615.9
1982	20,722.1	7,043.6	1,976.2	875.5	176.8	544.3
1983	21,416.8	7,458.8	2,128.5	858.2	221.6	502.3
1982						
1st Q	5,210.7	1,794.9	488.3	244.7	50.2	149.9
2nd Q	5,187.4	1,812.8	511.1	214.4	44.3	149.9
3rd Q	5,194.7	1,729.6	477.0	215.2	40.2	126.8
4th Q	5,129.3	1,706.3	499.7	201.2	42.2	117.6
1983						
1st Q	5,141.5	1,813.8	498.9	224.3	54.3	109.6
2nd Q	5,514.8	1,907.3	566.7	219.2	58.7	125.3
3rd Q	5,609.6	1,934.2	551.6	224.1	54.4	143.2
4th Q	5,150.9	1,803.5	511.2	190.6	54.2	124.2
1984						
1st Q	5,820.9	1,981.4	554.8	239.6	60.1	126.2
Apr.	2,484.8	810.1	256.2	147.4	24.6	61.1
	Percent change from same period in previous year					
1982	-0.9	5.3	10.3	15.3	2.0	-11.6
1st Q	1.7	5.2	9.1	22.0	26.1	0.8
2nd Q	-14.1	2.3	1.9	-2.8	-19.6	-21.9
3rd Q	2.8	3.3	8.7	18.1	1.3	-17.0
4th Q	9.4	10.9	23.6	29.1	9.0	-4.1
1983	3.4	5.9	7.7	-2.0	25.3	-7.7
1st Q	-1.3	1.1	2.2	-8.3	8.2	-26.9
2nd Q	6.3	5.2	10.9	2.2	39.6	-5.2
3rd Q	8.0	11.8	15.6	4.1	35.3	12.9
4th Q	0.4	5.7	2.3	-5.3	28.5	5.6
1984						
1st Q	13.2	9.2	11.2	6.8	10.6	15.2
Apr.	15.8	9.6	17.5	70.7	9.5	8.9

Note: This series derived by lagging excise tax base data one month to adjust for reporting delay.

Source: Hawaii State Department of Planning and Economic Development based on raw data from Hawaii State Department of Taxation.

Table 5-2.-- COLLECTIONS OF KEY STATE TAXES AND GENERAL FUND TAX REVENUES: CALENDAR YEARS 1970 TO 1984

[Thousands of dollars]

Year	General excise and use tax	Net individual income tax 1/	Net corporate income tax 2/	Tax revenues distributed to State general fund 3/
1970	172,289	112,019	13,241	337,216
1975	301,475	178,922	37,310	585,701
1978	392,236	239,587	25,597	749,216
1979	466,535	287,163	37,771	890,434
1980	527,304	335,670	43,912	1,008,750
1981	575,216	349,643	43,594	1,070,895
1982	574,590	296,757	34,785	1,011,465
1983	615,536	358,072	27,960	1,109,876
1983 1st Q	155,780	94,313	6,456	267,914
2nd Q	159,436	54,183	9,343	270,680
3rd Q	151,498	107,922	11,330	295,506
4th Q	148,822	101,656	831	275,775
1984 1st Q	165,120	112,154	9,543	293,272
Apr-May ..	120,373	45,962	13,641	204,855
	Percent change from corresponding period in previous year			
1978	11.4	12.9	11.2	11.5
1979	18.9	19.9	47.6	18.8
1980	13.0	16.9	16.3	13.3
1981	9.1	4.2	-0.7	6.1
1982	-0.1	-15.1	-20.2	-5.5
1983	7.1	20.7	-19.6	9.7
1983 1st Q	10.4	10.1	-38.6	7.9
2nd Q	8.1	331.2	-40.1	23.5
3rd Q	0.2	9.9	55.3	3.9
4th Q	10.4	1.3	-39.5	6.3
1984 1st Q	6.0	18.9	47.8	9.5
Apr-May ..	14.8	8.7	72.8	13.2

Note: This series represents data as reported by the Department of Taxation, without adjustment.

1/ Declaration of estimated taxes, plus payments with returns, plus withholding tax on wages, less refunds.

2/ Declaration of estimated taxes, plus payments with returns, less refunds.

3/ Excludes non-tax sources.

Source: Hawaii State Department of Taxation.

6. The Visitor Industry

The total number of visitors to Hawaii for the first four months of 1984 increased an impressive 15.3 percent over the same 1983 period. Both major directions of visitor travel showed substantial increases with westbound arrivals up 14.8 percent and eastbound arrivals 17.0 percent above the first four months of 1983. Some caution in interpreting these percentage increases must be exercised, however, since visitor arrivals in the first four months of 1983 were depressed somewhat while in the remainder of the year performance improved. Several additional months of visitor data will be needed to more accurately judge the true strength of the current rebound in the visitor industry.

Figure 6-1

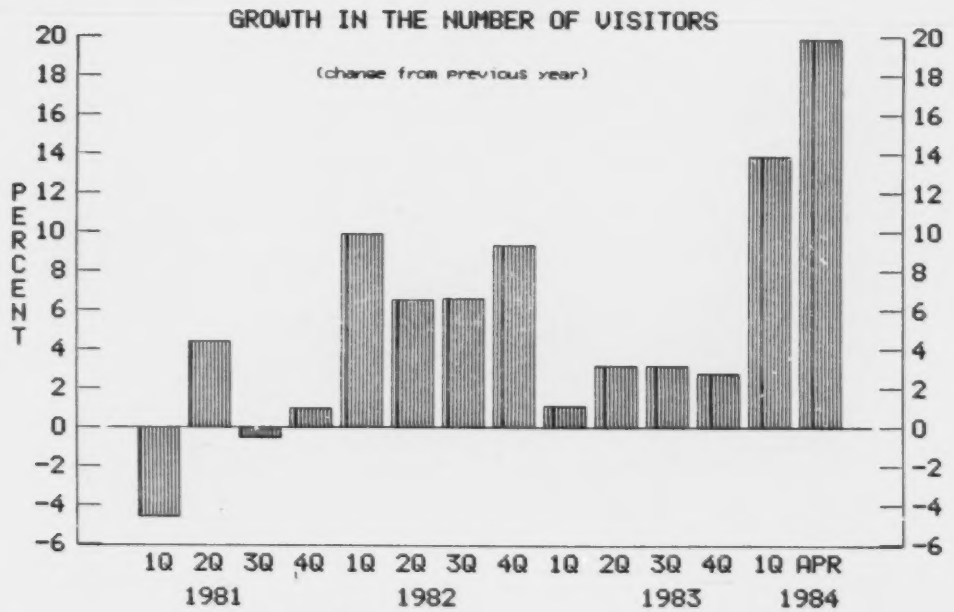


Table 6-1.-- VISITOR ARRIVALS AND AVERAGE DAILY VISITOR CENSUS: 1970 TO 1984

Year	Visitors staying overnight or longer			Average number present	
	Total	Westbound 1/	Eastbound 2/	Westbound 1/	All
1970	1,746,970	1,326,135	420,835	32,028	36,943
1975	2,829,105	2,207,417	621,688	59,495	66,308
1978	3,670,309	3,030,999	639,310	85,028	92,034
1979	3,960,531	3,139,455	821,076	89,678	98,676
1980	3,934,504	3,046,132	888,372	86,788	96,497
1981	3,934,623	2,974,791	959,832	85,576	96,095
1982	4,242,916	3,278,519	964,397	94,484	106,374
1983	4,357,184	3,404,434	952,750	(NA)	(NA)
1983 1st Q	1,069,945	845,441	224,504	(NA)	(NA)
2nd Q	1,082,474	838,537	243,937	(NA)	(NA)
3rd Q	1,146,170	903,447	242,723	(NA)	(NA)
4th Q	1,058,595	817,009	241,586	(NA)	(NA)
1984 1st Q	1,219,040	957,010	262,030	(NA)	(NA)
April	382,285	294,595	87,690	(NA)	(NA)
	Percent change from corresponding period in previous year				
1978	6.9	9.7	-4.6	12.3	10.8
1979	7.9	3.6	28.4	5.5	7.2
1980	-0.7	-3.0	8.2	-3.2	-2.2
1981	0.0	-2.3	8.0	-1.9	-1.0
1982	7.8	10.2	0.5	10.4	10.7
1983	2.7	3.8	-1.2	-	-
1983 1st Q	1.4	1.9	-0.5	-	-
2nd Q	3.2	5.4	-3.5	-	-
3rd Q	3.2	4.4	-1.0	-	-
4th Q	2.8	3.5	0.5	-	-
1984 1st Q	13.9	13.2	16.7	-	-
April	19.9	20.5	18.0	-	-

NA Not available.
1/ Arriving from the Mainland United States or Canada.
2/ Arriving from the Orient and Pacific areas.
Source: Hawaii Visitors Bureau.

Table 6-2.-- WESTBOUND VISITORS BY COUNTY: 1981 TO 1984

Year 1/	City and County of Honolulu	Hawaii County	Maui County	Kauai County
1981	2,398,477	672,683	1,389,892	757,811
1982	2,702,655	703,901	1,608,222	760,549
1983	2,697,179	739,050	1,702,792	717,143
1983: 1st Q	660,635	198,116	426,926	154,800
2nd Q	680,651	169,517	411,261	177,914
3rd Q	728,618	188,904	453,364	207,183
4th Q	627,275	182,513	411,241	177,246
1984: 1st Q	728,330	214,935	484,310	206,600
April	223,490	50,320	147,470	55,060
	Percent change from corresponding period in previous year			
1981	(NA)	(NA)	(NA)	(NA)
1982	12.7	4.9	15.6	0.5
1983	-0.2	5.0	5.9	-5.7
1983: 1st Q	-1.7	10.5	2.4	-18.6
2nd Q	2.2	3.6	6.9	-10.1
3rd Q	0.2	5.3	11.3	-0.7
4th Q	-1.5	0.3	2.8	7.9
1984: 1st Q	15.9	13.4	18.6	39.5
April	23.1	4.5	26.1	19.2

NA Not available.

1/ Data prior to 1981 are not comparable to later figures due to revisions.

Source: Hawaii Visitors Bureau.

Table 6-3.-- HOTEL OCCUPANCY RATES BY AREA: 1970 TO 1984

[Percent; survey does not include some large hotel chains]

Date	State	Waikiki	Hawaii	Kauai	Maui
Annual average:					
1970	71.2	74.1	68.3	58.0	66.7
1975	74.1	78.3	59.9	77.2	72.3
1978	79.5	82.1	65.0	83.3	80.4
1979	73.8	77.1	62.0	76.5	73.0
1980	69.3	71.7	52.7	69.6	66.2
1981	68.2	73.9	44.9	62.7	70.3
1982	70.4	77.7	44.0	57.5	73.9
1983	69.7	76.6	44.7	57.2	75.2
1983					
January	63.4	70.3	41.8	43.8	65.7
February	80.8	90.3	54.9	63.3	88.7
March	79.9	87.9	49.7	57.6	88.1
April	65.3	71.2	40.8	47.8	72.9
May	63.3	69.6	36.9	55.0	69.8
June	74.6	81.6	43.7	66.1	79.1
July	73.3	81.9	45.1	64.0	73.5
August	75.3	80.2	49.9	66.8	83.1
September	66.1	71.9	40.7	62.5	68.7
October	65.7	70.9	51.0	61.1	77.3
November	64.9	69.4	45.3	51.8	73.0
December	66.1	74.5	38.8	45.9	64.2
1984					
January	74.9	84.2	51.3	48.8	77.1
February	89.3	94.3	72.4	74.5	91.9
March	88.1	92.0	68.1	78.1	90.8
April	75.9	80.0	52.1	61.0	88.8

Source: Hawaii Visitors Bureau; Pannell Kerr Forster & Company from 1981.

Table 6-4.-- EXISTING HOTEL UNITS, BY GEOGRAPHIC AREAS: 1970 TO 1984

Year (February of each year)	State total	City and County of Honolulu		County of Hawaii	County of Kauai	County of Maui
		Total	Waikiki			
1970	26,923	18,449	16,590	3,166	2,565	2,743
1975	39,632	25,352	21,812	5,348	3,102	5,830
1976	42,648	25,851	22,117	6,045	3,520	7,232
1977	44,986	27,363	23,627	5,929	3,657	8,037
1978	47,070	28,546	24,934	6,002	3,786	8,736
1979	49,832	30,065	26,346	6,093	4,202	9,472
1980	54,246	34,334	30,443	5,889	4,322	9,701
1981	56,769	33,967	29,473	6,705	4,738	10,713
1982	57,968	33,492	29,047	7,167	5,147	11,596
1983	58,765	34,354	30,108	7,469	4,193	12,110
1984	62,448	36,848	32,239	7,149	5,313	13,138

Source: Hawaii Visitors Bureau.

Table 6-5.-- AVERAGE DAILY HOTEL ROOM RATES, BY ISLANDS: 1970 TO 1984

[Dollars]

Year	State	Oahu	Hawaii	Maui	Kauai
1970	25.74	(NA)	(NA)	(NA)	(NA)
1975	29.75	(NA)	(NA)	(NA)	(NA)
1976	29.54	26.70	30.52	37.61	34.51
1977	34.28	31.87	33.08	42.59	38.45
1978	38.56	35.90	36.70	47.86	42.25
1979	44.40	41.42	41.44	57.15	47.75
1980	47.37	42.70	46.40	61.34	55.16
1981	49.87	43.16	47.16	73.44	56.06
1982	51.78	44.80	47.37	75.02	58.48
1983	54.78	46.93	48.84	81.60	59.78
1984 (Jan-Apr)	60.76	50.20	57.08	93.13	68.30
	Percent change from previous year				
1976	-0.7	-	-	-	-
1977	16.1	19.4	8.4	13.2	11.4
1978	12.5	12.7	10.9	12.4	9.9
1979	15.2	15.4	12.9	19.4	13.0
1980	6.7	3.1	12.0	7.3	15.5
1981	5.2	1.1	1.6	19.7	1.6
1982	3.8	3.8	0.4	2.2	4.3
1983	5.6	4.6	3.4	8.8	2.2
1984 (Jan-Apr)	4.8	0.9	6.4	8.5	12.4

NA Not available.

Source: Pannell Kerr Forster & Company, Trends in the Hotel Industry, Hawaii.

7. Construction

The value of construction in Hawaii (as measured by the base upon which excise tax on construction is paid) increased 4.3 percent in the first quarter of 1984 from the same period a year earlier.

Authorizations for future construction increased sharply for the private sector in the first quarter of 1984 but declined for public sector construction. The total value of private permits was 24 percent ahead of the first quarter of 1983. The growth in private sector permit values was led by a 75.1 percent increase in commercial and industrial authorizations for the period. Public contracts awarded declined an overall 33.0 percent and all three levels of government -- Federal, State, and Local -- showed declines in the first quarter, although some improvement in contracts awarded appears in the partial second quarter data.

The number of jobs in construction declined almost 5 percent during the first five months of 1984 from the same period of 1983.

Figure 7-1

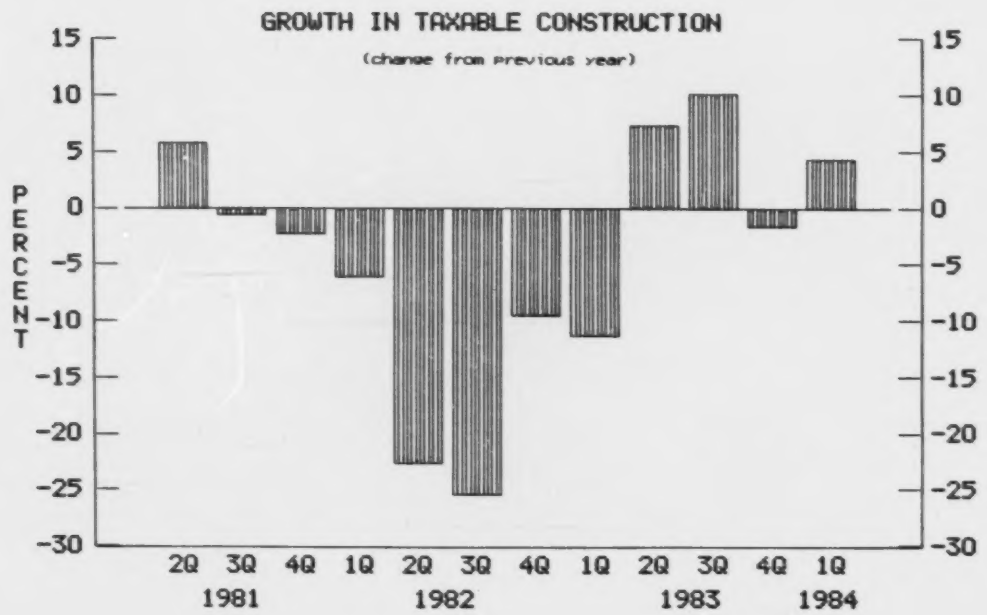


Table 7-1.-- ESTIMATED VALUE OF COMPLETED CONSTRUCTION, NEW PRIVATE BUILDING AUTHORIZATIONS AND GOVERNMENT CONTRACTS AWARDED: 1970 TO 1984

[Millions of dollars]

Year	Value of construction completed 1/	Private building authorizations				Government contracts awarded
		Total private authorization	Residential	Commercial and industrial 2/	Additions and alterations	
1970	783.8	447.2	212.5	184.5	50.2	176.2
1975	1,140.0	610.6	343.3	187.2	80.1	450.3
1980	1,569.7	1,219.2	680.2	331.5	207.5	230.6
1981	1,584.7	802.0	398.3	240.8	162.9	427.5
1982	1,323.9	683.1	299.2	242.9	141.1	392.7
1983	1,334.2	685.2	296.2	203.2	185.9	277.9
1983 1st Q ...	318.5	117.3	57.4	18.5	41.4	98.4
2nd Q ...	359.4	156.9	66.9	33.8	56.3	23.7
3rd Q ...	342.3	211.4	117.9	41.7	45.8	71.6
4th Q ...	313.9	199.6	54.0	103.2	42.5	84.2
1984 1st Q ...	332.1	145.8	75.5	32.3	38.0	65.9
	Percent change from corresponding period in previous year					
1980	16.9	39.3	27.1	53.8	67.2	-40.7
1981	1.0	-34.2	-41.4	-27.4	-21.5	85.4
1982	-16.5	-14.8	-24.9	0.9	-13.4	-8.1
1983	0.8	0.3	-1.0	-16.3	31.8	-29.3
1983 1st Q ...	-11.3	25.7	43.5	-12.6	61.7	41.8
2nd Q ...	7.3	15.6	27.4	-12.0	25.4	-81.6
3rd Q ...	10.1	-23.8	6.4	-63.7	30.1	-31.4
4th Q ...	-1.6	13.0	-43.7	127.3	20.4	-9.0
1984 1st Q ...	4.3	24.3	31.4	75.1	-8.2	-33.0

1/ Value of construction subject to State excise tax. Tax data adjusted to reflect reporting delay of about one month.

2/ Includes hotels.

Source: Hawaii State Department of Taxation; County building departments; Trade Publishing Co., Building Industry Digest: BID Service Weekly.

Table 7-2.-- ESTIMATED VALUE OF PRIVATE BUILDING CONSTRUCTION AUTHORIZATIONS BY COUNTY: 1970 TO 1984

[Millions of dollars]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	447.2	322.3	48.6	35.7	40.7
1975	610.6	407.1	49.7	36.1	117.7
1980	1,219.2	686.3	146.0	133.3	253.7
1981	802.0	454.1	136.5	67.7	139.6
1982	683.1	473.0	75.2	44.2	90.7
1983	685.2	366.8	86.7	140.5	91.3
1983 1st Q ...	117.3	65.4	18.8	21.4	11.8
2nd Q ...	156.9	80.4	22.2	37.7	16.5
3rd Q ...	211.4	139.1	25.0	32.0	15.3
4th Q ...	199.6	81.9	20.7	49.3	47.7
1984 1st Q ...	145.8	90.1	23.6	16.2	15.9
Apr-May .	(NA)	69.7	11.5	(NA)	9.7
	Percent change from corresponding period in previous year				
1980	39.4	36.9	30.1	17.1	72.0
1981	-34.2	-33.8	-6.5	-49.2	-45.0
1982	-15.1	4.2	-44.9	-34.7	-35.0
1983	0.3	-22.4	15.3	217.5	0.6
1983 1st Q ...	25.7	30.0	37.2	46.5	-19.7
2nd Q ...	15.6	4.8	-37.6	239.6	34.6
3rd Q ...	-23.8	-31.1	101.6	188.6	-70.7
4th Q ...	13.0	-43.2	54.2	555.7	319.0
1984 1st Q ...	24.3	37.8	25.5	424.3	34.7
Apr-May .	-	47.0	-37.2	-	-13.1

NA Not available.
Source: County building departments.

Table 7-3.-- ESTIMATED VALUE OF GOVERNMENT CONSTRUCTION CONTRACTS AWARDED BY AWARDING AGENCY: 1970 TO 1984

[Millions of dollars]

Year	Total	Federal	State	County
1970	176.2	34.5	107.8	33.9
1975	450.2	94.5	227.8	127.9
1980	230.6	66.5	120.0	44.1
1981	427.5	176.1	180.5	70.9
1982	392.7	139.6	182.0	71.2
1983	277.9	84.7	126.8	66.4
1983				
1st Q	98.4	11.7	53.7	33.1
2nd Q	23.7	5.7	8.4	9.6
3rd Q	71.6	16.9	37.0	17.7
4th Q	84.2	50.4	27.7	6.0
1984				
1st Q	65.9	8.7	38.9	18.3
2nd Q	(NA)	33.2	78.0	(NA)
	Percent change from corresponding period in previous year			
1980	-40.7	-37.1	-45.7	-28.8
1981	85.4	164.8	50.5	60.6
1982	-8.1	-20.7	0.8	0.4
1983	-29.3	-39.3	-30.3	-6.7
1983				
1st Q	46.2	-44.8	93.9	80.7
2nd Q	-81.6	-92.3	-77.4	-26.7
3rd Q	-31.4	186.4	-54.4	1.7
4th Q	-9.1	47.8	-23.3	-73.3
1984				
1st Q	-33.0	-25.7	-27.4	-44.7
2nd Q	-	478.3	828.5	-

NA Not available.

Source: Trade Publishing Co., Building Industry Digest: BID Service Weekly and First Hawaiian Bank, Research Division.

Table 7-4.-- NUMBER OF SINGLE-FAMILY HOUSING UNITS AUTHORIZED, BY COUNTY: 1970 TO 1984

[Includes duplexes]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	5,611	4,017	790	326	478
1975	3,233	1,155	838	343	897
1976	3,383	1,384	821	297	881
1977	4,891	2,281	1,074	445	1,091
1978	5,219	2,270	1,382	567	1,000
1979	6,181	3,156	1,445	556	1,024
1980	4,058	1,645	1,204	401	808
1981	2,649	728	1,048	409	464
1982	2,285	725	800	230	530
1983	3,417	1,627	938	291	561
1983 1st Q	896	471	242	57	126
2nd Q	952	502	212	73	165
3rd Q	862	396	240	80	146
4th Q	707	258	244	81	124
1984 1st Q	1,092	651	224	70	147
Apr-May ...	(NA)	370	159	(NA)	107
	Percent change from corresponding period in previous year				
1978	6.7	0.5	28.7	27.4	-8.3
1979	18.4	39.0	4.6	-1.9	2.4
1980	-34.4	-47.9	-16.7	-27.9	-21.1
1981	-34.7	-55.7	-13.0	2.0	-42.6
1982	-13.7	-0.4	-23.7	-43.8	14.2
1983	49.5	124.4	17.3	26.5	5.8
1983 1st Q	89.8	474.4	22.8	-8.1	-8.7
2nd Q	77.6	311.5	-0.5	15.9	19.6
3rd Q	37.7	82.5	29.0	31.1	-9.9
4th Q	8.5	-15.1	19.6	84.1	25.3
1984 1st Q	21.9	38.2	-7.4	22.8	16.7
Apr-May ...	-	44.0	15.2	-	13.8

NA Not available.
Source: County building departments.

Table 7-5.-- NUMBER OF MULTI-FAMILY HOUSING UNITS AUTHORIZED, BY COUNTY: 1970 TO 1984

[Three or more units per structure]

Year	State	City and County of Honolulu	Hawaii County	Kauai County	Maui County
1970	4,620	3,673	389	67	491
1975	6,992	4,186	498	202	2,106
1976	3,751	3,397	129	4	221
1977	3,129	2,389	129	83	528
1978	4,236	1,968	334	610	1,324
1979	6,351	1,804	718	1,125	2,704
1980	6,603	3,297	727	766	1,813
1981	3,142	1,873	270	64	935
1982	4,594	4,109	245	118	122
1983	1,341	1,220	38	73	10
1983 1st Q	11	0	11	0	0
2nd Q	168	149	0	9	10
3rd Q	1,058	967	27	64	0
4th Q	104	104	0	0	0
1984 1st Q	61	22	4	35	0
Apr-May ...	(NA)	418	2	(NA)	0
	Percent change from corresponding period in previous year				
1978	39.1	-1.8	158.9	(X)	150.8
1979	49.9	-8.3	115.0	84.4	104.2
1980	4.0	82.8	1.3	-31.9	-33.0
1981	-52.4	-43.2	-62.9	-91.6	-48.4
1982	46.2	119.4	-9.3	84.4	-86.9
1983	-70.8	-70.3	-84.5	-38.1	-91.8
1983 1st Q	-96.5	-100.0	(X)	-100.0	-100.0
2nd Q	-7.7	2,383.3	-100.0	(X)	(X)
3rd Q	-42.2	-45.6	-50.9	(X)	0
4th Q	-95.4	-95.4	-100.0	0	0
1984 1st Q	454.5	(X)	-63.6	(X)	(X)
Apr-May ...	-	(X)	(X)	-	-100.0

NA Not available.
X Not calculated -- data in base period equaled zero.
Source: County building departments.

Table 7-6.-- CONSTRUCTION EMPLOYMENT AND EARNINGS: 1970 TO 1984

Year	Total jobs	Average weekly hours	Full-time equivalent jobs 2/	Insured unemployed persons	% unemployed 1/	Average hourly earnings (in dollars)
1970	25,750	38.9	25,050	1,150	4.4	5.56
1975	26,350	37.9	24,950	4,150	14.3	7.81
1976	21,400	36.2	19,350	5,650	22.6	8.80
1977	19,750	35.7	17,650	4,150	19.1	9.87
1978	20,650	36.6	18,900	2,500	11.7	10.53
1979	23,400	36.0	21,050	1,700	7.5	11.05
1980	23,950	36.2	21,700	2,650	10.9	11.85
1981	21,900	36.2	19,800	3,500	15.0	13.13
1982	17,850	35.8	16,000	4,000	20.0	14.50
1983	17,950	37.2	16,700	(NA)	(NA)	15.80
1983 1st Q ..	18,100	38.6	17,450	2,850	14.0	15.53
2nd Q ..	17,850	37.6	17,250	(NA)	(NA)	15.64
3rd Q ..	17,900	38.0	17,000	(NA)	(NA)	15.81
4th Q ..	17,900	34.3	15,350	(NA)	(NA)	16.23
1984 1st Q ..	17,450	38.1	16,600	(NA)	(NA)	16.36
Apr-May	16,850	(NA)	(NA)	(NA)	(NA)	(NA)
	Percent change from corresponding period in previous year					
1978	4.6	2.5	7.1	-39.8	(X)	6.7
1979	13.3	-1.6	11.4	-32.0	(X)	4.9
1980	2.4	0.6	3.1	55.9	(X)	7.2
1981	8.6	0.0	-7.1	32.1	(X)	11.2
1982	-18.5	-1.1	-19.2	14.3	(X)	9.4
1983	0.6	3.9	4.4	(NA)	(X)	9.0
1983 1st Q ..	-4.6	11.9	6.7	-40.0	(X)	11.1
2nd Q ..	-1.3	5.6	7.1	(NA)	(X)	10.1
3rd Q ..	2.9	1.3	4.3	(NA)	(X)	10.9
4th Q ..	5.8	3.6	9.6	(NA)	(X)	6.1
1984 1st Q ..	-3.6	-1.3	-4.9	(NA)	(X)	5.3
Apr-May	-5.6	(NA)	(NA)	(NA)	(X)	(NA)

NA Not available.
X Not applicable.
1/ Percent unemployed is defined as the ratio of insured persons to the total of insured unemployed and full-time equivalent jobs, expressed as a percent.
2/ Equivalent number of jobs if all workers had worked a 40-hour week.
Source: Hawaii State Department of Labor and Industrial Relations.

Table 7-7.-- HONOLULU CONSTRUCTION COST INDEXES: 1970 TO 1984

[1967=100]

Year 1/	Single-family residence			High-rise building		
	All components	Material prices	Labor 2/	All components	Material prices	Labor 2/
1970	118.0	112.9	124.5	117.9	109.3	125.2
1975	175.7	167.1	186.6	178.8	171.3	185.3
1979	266.2	248.3	288.8	264.3	237.6	287.5
1980	283.2	263.8	307.8	290.1	270.5	307.1
1981	291.2	254.2	336.6	308.2	274.6	337.4
1982	304.7	250.6	373.0	330.3	281.4	372.8
1983	331.5	276.5	400.9	352.1	294.6	402.0
1983						
March ..	324.0	267.7	395.0	348.7	292.4	397.4
June ...	336.6	288.9	396.8	351.5	297.1	398.6
Sept. ..	338.2	282.6	408.4	355.4	296.7	406.3
Dec. ...	339.8	282.7	411.9	359.0	297.0	413.0
1984						
March ..	348.0	283.0	430.0	367.4	296.0	429.3
	Percent change from corresponding period in previous year					
1979	9.4	13.5	5.2	9.5	16.1	5.3
1980	6.4	6.2	6.6	9.8	13.8	6.8
1981	2.8	-3.6	9.4	6.3	1.5	9.9
1982	4.6	-1.4	10.8	7.2	2.5	10.5
1983	8.8	10.3	7.5	6.6	4.7	7.8
1983						
March ..	7.6	7.0	8.0	6.8	3.9	8.7
June ...	11.6	16.0	7.9	7.7	6.3	8.6
Sept. ..	9.0	13.4	5.3	4.8	5.5	4.4
Dec. ...	7.9	11.3	5.5	4.8	3.8	5.4
1984						
March ..	7.4	5.7	8.9	5.4	1.2	8.0

1/ Annual averages unless otherwise specified.
2/ Includes wages and benefits.
Source: First Hawaiian Bank, Research Division.

8. Major Sources of Income

Defense expenditure reports available for 1984 indicate a 1.4 percent decline in defense spending in the State for the first quarter of 1984 compared to the same 1983 period. Defense expenditures in Hawaii during 1983 rose almost 9.5 percent from the 1982 level.

The value of processed sugar shipments to the Mainland for the first quarter of 1984 showed a 15 percent decline over the same period of 1983. Shipments of canned pineapple, on the other hand, increased 64 percent in the first quarter of 1984, probably reflecting an inventory reduction rather than an upsurge in sales.

Table 8-1.--DIRECT INCOME OR PRODUCTION VALUE OF MAJOR EXPORT INDUSTRIES: 1960 TO 1983

[Millions of dollars]

Year	Visitor expenditures	Defense expenditures	Value of production	
			Sugar 1/	Pineapple
1960	131	351.4	118.4	119.4
1970	595	639.4	187.8	138.6
1971	705	708.8	202.9	141.4
1972	840	744.2	184.7	145.4
1973	1,020	840.9	222.2	142.4
1974	1,225	897.9	676.6	127.1
1975	1,360	982.9	366.1	136.7
1976	1,640	1,034.2	257.0	144.5
1977	1,845	1,086.6	226.8	161.6
1978	2,146	1,155.5	285.2	162.9
1979	2,537	1,221.7	345.7	206.4
1980	2,875	1,317.4	594.1	226.5
1981	3,200	1,449.3	327.9	217.6
1982	3,700	1,693.4	351.5	206.0
1983	3,800 (p)	1,821.2 2/	(NA)	(NA)

p Preliminary.
NA Not available.
1/ Includes value of molasses.
2/ Excludes Coast Guard expenditures.
Source: Hawaii Visitors Bureau; quarterly reports of armed forces; Hawaiian Sugar Planters' Association; Pineapple Growers Association of Hawaii and State Department of Agriculture.

Table 8-2.-- DEFENSE EXPENDITURES IN HAWAII BY SERVICE: 1970 TO 1984

[Millions of dollars]

Year or quarter	Total	Navy and Marine	Army	Air Force	Coast Guard
1970	639.4	328.7	183.5	114.0	13.2
1975	982.9	469.7	378.3	118.6	16.3
1980	1,317.4	711.3	441.8	141.7	22.7
1981	1,449.3	770.4	493.8	158.3	26.7
1982	1,693.4	878.2	611.5	173.7	29.9
1983 1/	1,852.6	935.9	702.7	182.6	31.4
1983 1/					
1st Q	469.5	230.7	187.3	43.8	7.7
2nd Q	454.1	237.7	163.1	45.5	7.8
3rd Q	463.9	229.9	178.2	47.9	7.9
4th Q	465.2	237.7	174.1	45.4	8.0
1984 1/					
1st Q	462.8	237.5	163.2	54.0	8.1
	Percent change from corresponding quarter in previous year				
1980	7.8	11.0	2.8	9.6	2.7
1981	10.0	8.3	11.8	11.7	17.6
1982	16.8	14.0	23.8	9.7	12.0
1983 1/	9.4	6.6	14.9	5.1	5.0
1983 1/					
1st Q	16.7	7.6	31.3	6.6	1.2
2nd Q	10.2	13.8	7.9	2.2	1.2
3rd Q	4.6	2.8	5.5	10.6	1.2
4th Q	6.7	1.3	17.0	1.3	1.2
1984 1/					
1st Q	-1.4	2.9	-12.9	23.3	1.2

NA Not available.

Note: Data include all appropriated expenditures for military and civilian payrolls, services, supplies and construction. Excludes R&R expenditures, dependent allotments, retired military pay and non-appropriated funds for exchanges, clubs, special services, etc.

1/ Coast Guard expenditures estimated.

Source: Quarterly reports from armed forces, compiled by DPED.

Table 8-3.-- VALUE OF PROCESSED SUGAR AND CANNED PINEAPPLE SUBJECT TO STATE EXCISE TAX: 1979 TO 1984

Year	Value of shipments 1/ (millions of dollars)		Percent change from same period in previous year	
	Sugar processing 2/	Pineapple canning	Sugar processing	Pineapple canning
1979	294.1	174.2	(NA)	(NA)
1980	545.3	190.9	85.4	9.6
1981	392.5	169.8	-28.0	-11.1
1982	336.3	189.3	-14.3	11.5
1983	421.5	174.2	25.3	-8.0
1982				
1st Q	62.9	44.3	-49.4	65.3
2nd Q	80.8	38.8	-33.6	-22.6
3rd Q	100.6	63.1	19.2	-1.4
4th Q	92.0	43.1	47.4	49.1
1983				
1st Q	105.9	32.6	68.4	-26.4
2nd Q	99.9	40.4	23.6	4.3
3rd Q	136.2	50.9	35.4	-19.3
4th Q	79.4	50.3	-13.7	16.7
1984				
1st Q	90.1	53.6	-14.9	64.4

NA Not available.

Note: These data are compiled for excise tax purposes and for various reasons differ from annual figures in table 8-1, prepared by the Hawaii State Department of Agriculture. These are, however, the only data related to the value of sugar and pineapple that are available on a monthly or quarterly basis and provide an indication of industry trends.

1/ Processed sugar and canned pineapple are taxed at the time the products leave factory inventories rather than at the time of actual sale.

2/ Includes value of molasses.

Source: Hawaii State Department of Taxation.

Table 9-1.-- RECENT ECONOMIC AND DEMOGRAPHIC TRENDS: STATE OF HAWAII

Series 1/	Unit	Period 2/	Number	Percent change	
				From preceding period	From same period in previous year
Resident population					
State	Persons	July 1, 1983	1,023,200	-	2.5
City and County of Honolulu (p)	Persons	July 1, 1983	796,000	-	2.2
Hawaii County (p)	Persons	July 1, 1983	104,000	-	3.8
Kauai County (p)	Persons	July 1, 1983	43,600	-	3.8
Maui County (p) 3/	Persons	July 1, 1983	79,700	-	3.5
Income					
Total personal income 4/	$ Million	4th Qtr 1983	12,651	2.2	7.1
Consumer price index (Honolulu)					
All items	(1967=100)	April 1984	283.2	0.9 5/	3.8
Food prices	(1967=100)	April 1984	315.6	0.9 5/	2.8
Construction					
Total private permits	$ Million	1st Quarter	145.8	-27.0	24.3
Total residential permits	$ Million	1st Quarter	75.5	39.8	31.4
New single-family units	Number	1st Quarter	1,092	54.5	21.9
New multi-family units	Number	1st Quarter	61	-41.3	454.5
Government contracts awarded	$ Million	1st Quarter	65.9	-21.7	-33.0
Construction cost indexes (Hon.)					
Single family	(1967=100)	March	348.0	1.6	7.4
High-rise buildings	(1967=100)	March	367.4	1.7	5.4
Employment (p)					
Total civilian labor force	Persons	1st Quarter	472,300	0.3	0.6
Civilian employment	Persons	1st Quarter	446,000	0.9	1.7
Civilian unemployment	Persons	1st Quarter	26,300	-8.8	-14.6
Unemployment rate	Percent	1st Quarter	5.5	-	-
Total jobs	Number	1st Quarter	446,600	-0.4	0.3
Visitor industry					
Total visitors	Number	Jan-April	1,601,325	-	15.3
Westbound	Number	Jan-April	1,251,605	-	14.8
Eastbound	Number	Jan-April	349,720	-	17.0
Visitor expenditures (p)	$ Million	1983	4,000	-	8.1
Hotel units	Number	February	62,448	-	6.3
Defense expenditures 6/	$ Million	1983	1,821.2	-0.5	-1.6
Sugar production	$ Million	1982	351.5	-	7.2
Pineapple sales	$ Million	1982	206.0	-	-5.3

p Preliminary.
1/ Statewide data unless indicated otherwise.
2/ 1984 data unless indicated otherwise.
3/ Includes Kalawao County.
4/ Seasonally adjusted at annual rate.
5/ From February.
6/ Excludes Coast Guard.